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GREYLOCK CENTER

Request for Development Proposals



Photo by J.R. Melanson

Expanded Program

April 1996

MASSACHUSETTS



Executive Office of Environmental Affairs
Department of Environmental Management
Executive Office of Administration and Finance
Division of Capital Planning and Operations
100 Cambridge Street, Room 1404
Boston, Massachusetts 02202

Dear Prospective Respondents:

On behalf of the Commonwealth of Massachusetts, we invite your response to this revised and expanded Request For Development Proposals (RFDP) for the development of Greylock Center, a full service conference resort, recreation and education center. This spectacular 1,063 acre site is located at the base of Mt. Greylock in the town of Adams.

This RFDP has undergone major revisions from the RFDP issued in 1995. We learned from the development proponents and from independent financial consultants that major changes were needed in the development program and the RFDP process. Forty-five days after the original development proposals were rejected, the Developer Selection Committee and our staff developed master plan amendments and recommendations for a simplified RFDP process. The Greylock Center Master Plan has been amended with unanimous support by the Greylock Center Advisory Committee and the Department of Environmental Management Board. The most significant revisions to the Master Plan, the RFDP and the development process include:

- A simplified RFDP process seeking out a development team's experience, financial capability and creative ability to fulfill the mission of Greylock Center;
- Allowance of residential units that relate to the development program and fit on the site environmentally;
- Allowance of up to 27 holes of golf;
- Allowance of individual/time interval ownership of buildings and structures;
- A DEM dollar for dollar match (up to \$50,000) for conference center/institute programming, financing and partnership linkages;
- A \$150,000 early action program of on site programming and improvements to be launched this Spring.

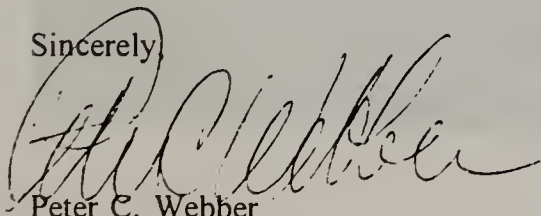
Greylock Center will provide lodging, educational and recreational opportunities in a way that will be sustainable for the environment and good for the economy of the Town of Adams and the Berkshires.

A copy of the Report of the Greylock Center Developer Selection Committee can be found in the Appendix for your information. This report presents marketing, financial, and programmatic recommendations and a particular focus on the importance of the conference center/institute.

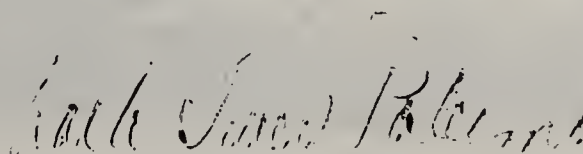
Greylock Center enjoys Governor William F. Weld's commitment of support as well as that of the Town of Adams. A \$6.5 million Commonwealth appropriation is earmarked to foster development on the site and both state and local agencies will assist the developer in permitting the project and in identifying and securing the required state, local and not-for-profit participation in the project.

We are excited about this development opportunity and invite you to join us in creating Greylock Center by submitting a development proposal. We are prepared to answer any questions you may have about the site and the vision of Greylock Center.

Sincerely,

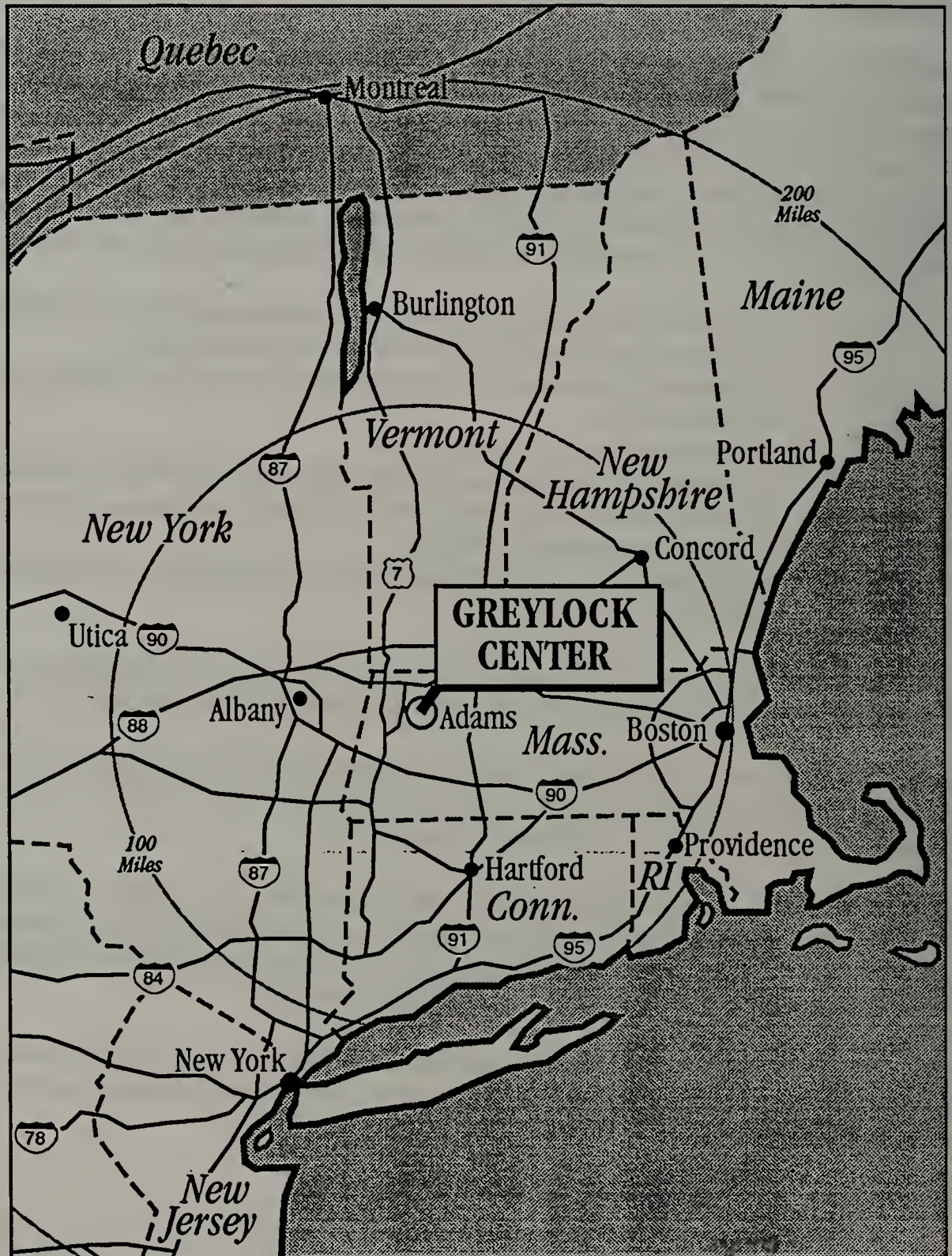


Peter C. Webber
Commissioner
Department of
Environmental Management



Lark Jurev Palermo
Commissioner
Division of
Capital Planning and Operations

REGIONAL LOCATION



BERKSHIRE COUNTY CULTURAL ATTRACTIONS

2 Million people visit the Berkshires every year and spend \$170 million.

- A. Williamstown Theatre Festival
- B. Clark Art Institute
- C. Williams College Museum of Art
- D. Mass MOCA
- E. Greylock Center
- F. Berkshire Public Theatre
- G. Hancock Shaker Village
- H. Berkshire Museum
- I. Tanglewood Music Festival
- J. National Music Foundation
- K. Shakespeare & Company
- L. Berkshire Opera
- M. Berkshire Theatre Festival
- N. Norman Rockwell Museum
- O. Chesterwood
- P. Albert Schweitzer Center
- Q. Jacobs Pillow Dance Festival

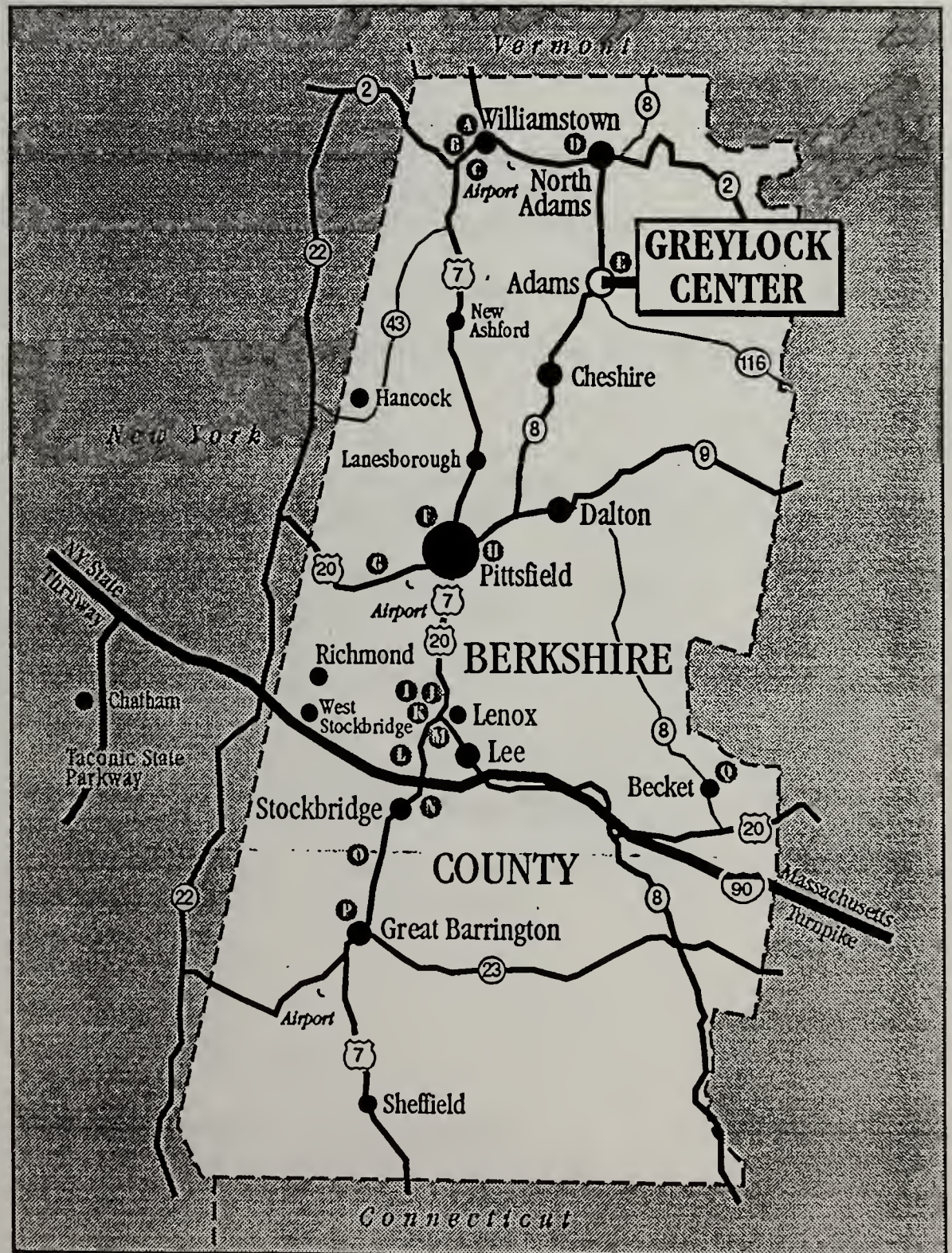
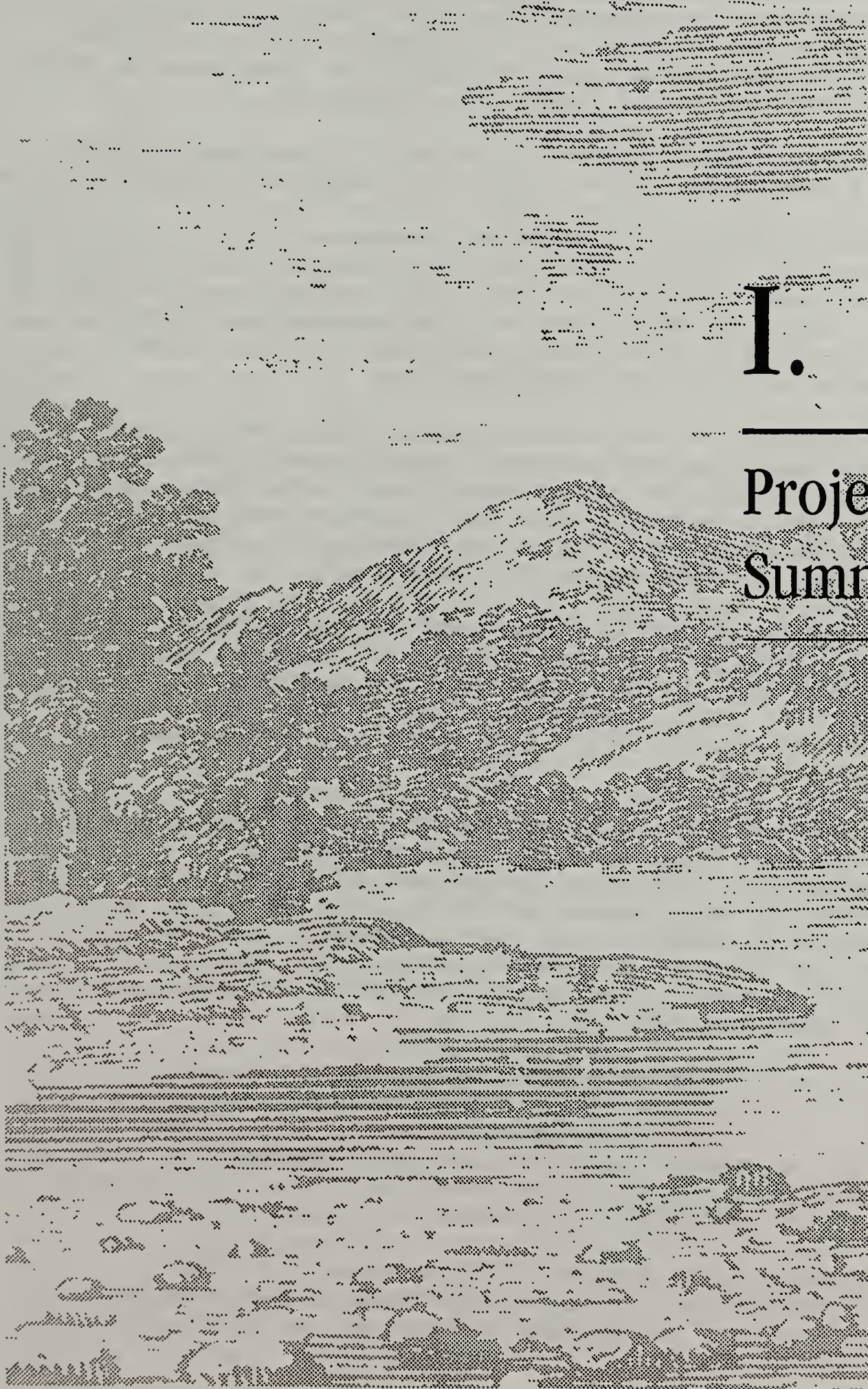




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I.

Project Summary

A. DEVELOPMENT OVERVIEW

The Commonwealth of Massachusetts is pleased to present this Request For the Development Proposals (RFDP) to develop a 1,063 acre parcel of land where Greylock Center will be built. This parcel of land is located at the base of Mount Greylock in the Town of Adams, Massachusetts.

The purpose of this request is to solicit proposals from qualified development teams that are capable of developing a compelling, appropriately scaled project that best fulfills the vision of Greylock Center as described in this RFDP, the Greylock Center Master Plan and the enabling legislation of Chapter 676 of the Acts of 1985. The legislation intends that the lands be developed to provide regional economic benefits to the Town of Adams and also environmental, educational and recreational benefits.

Greylock Center will be a four-season conference resort, recreation and education center. Development teams are encouraged to utilize technologies and techniques which help minimize environmental impact and promote sustainable resource use. The master plan delineates the creation of four complementary uses as outlined below:

- Full-amenity, year-round inn/lodging facility with up to 200 guest suites. Also included in the program are a full complement of conference, dining, indoor recreation and fitness facilities, commercial and retail space and an outdoor special events area.
- Residential units that support the programming and curriculum offerings of Greylock Center. Residential uses may include a variety of ownership structures including time interval ownership both within the residential units as well as in the conference center/inn. Rustic cabins, staff residential quarters, and camp sites are also possible.
- Recreation offerings including a golf course with up to 27 holes, trails for both summer and winter use, a sledding/tobogganning area, an outdoor swimming area, nature recreation, norpine & telemark skiing, fitness areas and other activities that will promote year round visitation.
- Comprehensive high quality programming for environmental and other educational purposes are encouraged. Suggested educational settings may

include a stand-alone conference center, a non-profit institute or thematic learning center, meeting and conference facilities within the inn/lodging facility , an interpretative center, a wellness and physical fitness area, a residential environmental education center, sustainable development demonstration areas (to showcase the application of green technologies, energy efficient operations and resource conservation techniques) and an interpretative nature trail.

In keeping with the goal of demonstrating that economic development and environmentalism can be mutually supportive, Greylock Center is intended to utilize and demonstrate sustainable development approaches in its design, construction and operation. In practical terms this will likely translate into how buildings are sited and built, integrating solar features into building designs, enhancing wildlife habitat, using recycled materials, and minimizing on-site vehicular use. Opportunities for sustainable demonstrations exist with landscaping, natural resource restoration of the site, forestry and agricultural practices, septic systems, trail construction techniques, energy saving and energy generation techniques, how the golf course is designed and maintained, among many other exciting examples. The potential exists for Greylock Center to be a place where sustainable techniques can be tried, tested, promoted and celebrated.

PUBLIC SUPPORT

Support for the development of Greylock Center is strong on the part of citizens, the Town of Adams, environmentalists, Commonwealth officials and other interested parties. A 24 member local advisory committee has played a critical role in bringing consensus around the master plan and development planning efforts. Senator Jane Swift and Representative Dan Bosely have committed much time and their support to Greylock Center. The recent revisions proposed for the master plan initially created controversy and much debate but in the end the revisions received the unanimous support of the Advisory Committee and the Department of Environmental Management Board.

The Town of Adams strongly supports the development of Greylock Center and its mission and is collaborating closely with the Commonwealth in its development. The Board of Selectman have adopted a resolution committing the entire town to a policy of sustainable development. The Town of Adams changed the zoning of the site to accommodate the project, secured the state designation of "Economic Opportunity Area" for the site, and is prepared to apply for

grants and loans on behalf of the project.

The Weld/Celluci administration, primarily through the Department of Environmental Management (DEM) and the Division of Capital Planning and Operations (DCPO), supports Greylock Center in the following ways:

- \$6.5 million for site improvements;
- A remarkable development site of 1,063 acres;
- Market feasibility, development cost and revenue estimates, a natural resource inventory and a wealth of other critical information is available;
- Assistance in securing additional public, private, and not-for-profit investment to enhance the project;
- A \$50,000 dollar-for-dollar matching fund for pre-development expenses for the conference center programming and development;
- Coordinated State permit assistance;
- A \$150,000 early action program for trail & site improvements and programming this spring and summer;
- Commonwealth tax and investment incentives.

The Commonwealth and the Town of Adams are also firmly committed to working with the designated developer to craft the final development parameters and program & curriculum offerings that will make Greylock Center fulfill its mission and be financially successful.

PROJECT REVISIONS

The Greylock Center development program has been significantly strengthened and expanded from what was previously called for in 1995.

MASTER PLAN REVISIONS

The lessons learned have resulted in the following master plan revisions:

- The Land Use Guidelines have been modified to incorporate the site constraints identified by the natural resource inventory findings and recommendations, as made by the natural resource team assembled by the Center for Ecological Technology of Pittsfield, Massachusetts and the land use firm of Sasaki Associates, Inc. of Watertown, Massachusetts. The land use map now shows two areas; a development area and a recreation & resource management area where high impact development is prohibited.
- Development Programming Guidelines now incorporate changes in program limits, specifically:

- Allowance of residential units as long as: the construction and operation of those units follow the site & building guidelines; the residential units relate to the other project components and support the programming & curriculum offerings of Greylock Center; and they provide financial benefits to the project, the Town of Adams, and the region.

Sasaki Associates, Inc. has completed a proof plan of the proposed development program that indicates that a development program that contains 300 residential units, 27 holes of golf, and the remaining, equally important project priorities can be accommodated on the site. The final number of residential units is not predetermined and will be based on the criteria described above.

- Expansion of the golf course up to 27 holes if such expansion is done in an environmentally sensitive manner and does not detract from the other intended, equally important uses of the site.
- The inclusion of alternative ownership structures such as time interval ownership as an option both within the residential units as well as in the conference center, and
- The suggestion of the creation of space for one or more institutes/themed learning centers.

CHANGES IN DEVELOPER SELECTION PROCESS

The Advisory Committee also recognized that the development program could not be finally completed without a designated developer. In recognition of this, the Advisory Committee recommended that the new RFDP reward proponents who have the capabilities and capacities to carry out the project in a consultative manner to create a development plan which would achieve the following objectives:

- Market feasibility,
- Economic vitality at both the micro and macro levels,
- Environmental sensitivity,
- Minimizes risk & public subsidy, and
- Maximizes opportunity.

These five objectives set the ultimate performance measures through which the best development team will be found and the best Greylock Center project built.

It is understood that more pre-development work is necessary on pinning down programming, market, cost, design, and the integration of residential, conference/lodging, sustainability and recreational offerings. This RFDP critically seeks out the capability of development teams to set a course, demonstrate the experience to both crystalize the development plan and built it in a timely low risk fashion.

\$50,000 PRE-DEVELOPMENT FUND FOR CONFERENCE CENTER/INSTITUTE

For the development program to reach the optimal mix of programs and facilities, greater public and private investment, especially for those non-profit/public elements, will be required. Based on the recommendations of the Advisory Committee, developers and others the Commonwealth is establishing a \$50,000 fund, to be matched by the developer who is given preliminary designation, to assist in:

- Development of the conference center/education programming;
- Seeking out new public, private, and non-profit investment which would strengthen the conference/educational component of the project; and
- Creating a foundation or institute which would further the interests of Greylock Center.

Greylock Center is intended to meet a standard of excellence and renown with equal standing to other well known institutes and centers. The intention is that conferencing and programming ability of this stature will make Greylock a destination resort, thus financially supporting the other lodging, residential and recreational components.

Developers are asked to provide work plans in their submissions detailing how they will proceed on this front in a timely manner. Information will be solicited on what personnel will be leading and undertaking this effort, what educational institutions, corporations and other partners will be approached. It is assumed that the process may take four to six months. Continued developer designation will hinge on the successful completion of these tasks.

If a proponent can demonstrate that a new approach yet to be proposed can work equally well without an institute or a thematic learning center it will be seriously considered as long as the project still retains its connection to sustainability in its design, construction and operation and the project remains true to the mission of Greylock Center.

EARLY ACTION PROGRAMS

A \$150,000 early action program will take place this Spring and Summer that will consist of trail and other physical improvements and programming on the site. This effort will bring people to the site and create excitement for the many possible recreational, residential and learning possibilities soon to come.

Corresponding with the Commonwealth's pre-development commitments, potential developers are being asked through the RFDP to develop early action plans of their own. Project marketing and on-site programming are needed to build upon this current momentum. Developers who commit to well thought out pre-construction actions, early marketing, and programming will be favored in developer selection process.

AN INVITATION

Conceived and developed with a combinations of public and private resources, Greylock Center is a special development opportunity. Greylock Center represents an integrated package of experiences that visitors are seeking. It will be possible to attend conferences and meetings, swim, hike, bike, golf, cross country ski and enrich themselves through seminars and classes, all on a spectacular site. Further, the sustainable designs and practices and the rich variety of educational opportunities will distinguish Greylock Center. Greylock Center is a unique opportunity to put your signature on an outstanding project.

To learn more about this outstanding development opportunity you are invited to attend the site visit in the Town of Adams on May 2 to learn more about this extra ordinary opportunity and to join us in creating Greylock Center.

B. PROPERTY DESCRIPTION

The site is ideal for the fulfillment of the Greylock Center development vision. The site's physical features are briefly summarized below. A more detailed description of the property along with pertinent mapping information is provided in the Development Guidelines section of the RFDP. Additional physical information about the property can also be found in the Greylock Center Master Plan as well as in the Sasaki Associates, Inc. accommodation plan and the natural resource inventory conducted by the Center for Ecological Technology. This information is in the Supplemental Information Package which is available upon request.

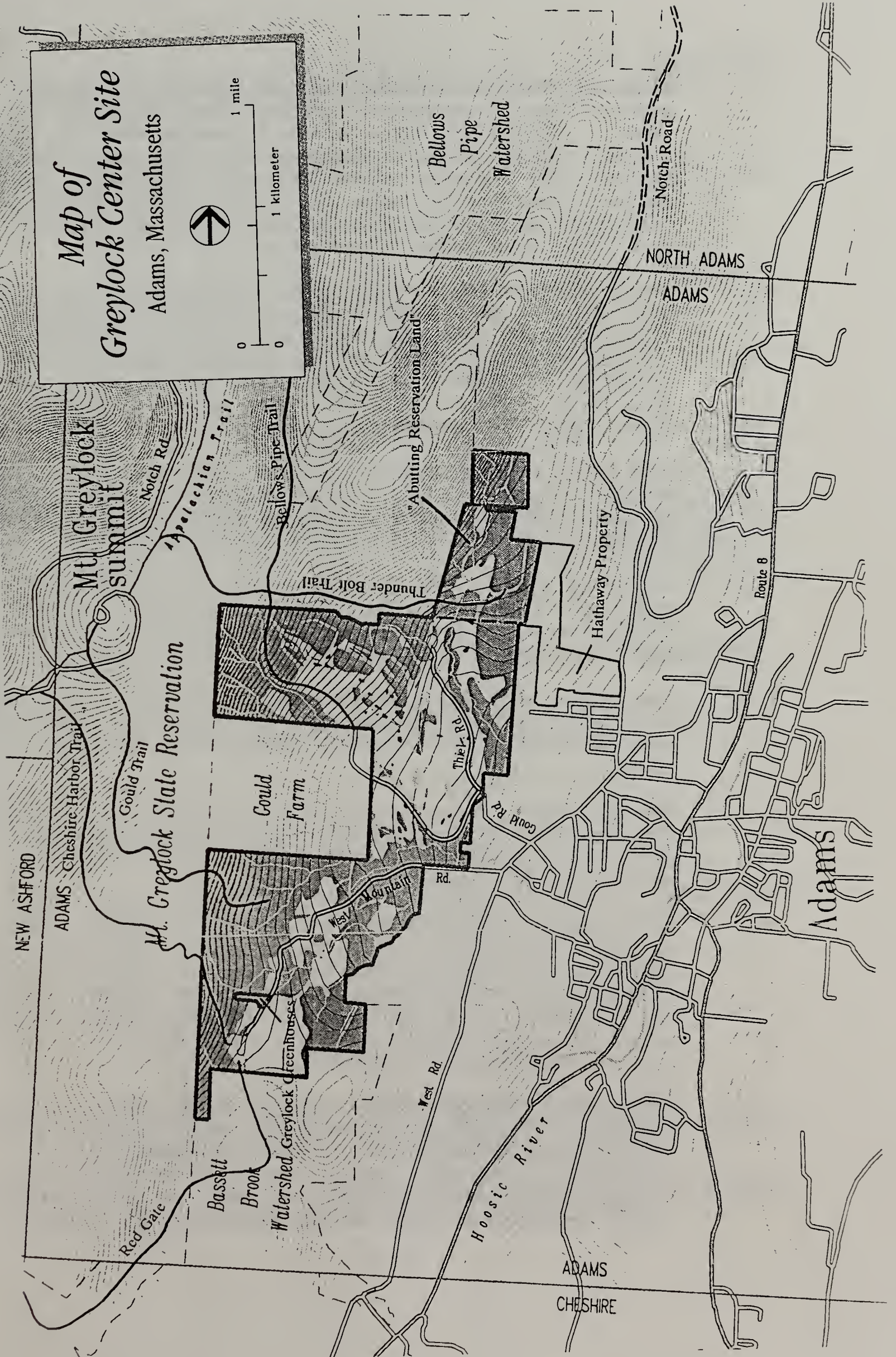
- **Acreage:** 1,063 acre tract of state-owned rolling farmland and wooded mountainside in the north Berkshire town of Adams, Massachusetts.
- **Landscapes and environments:** Open fields, woodlands, wetlands, and bodies of water. Today, much of the site remains in open fields. The wooded portions are primarily second growth northern hardwoods (maple, beech, birch) and spruce-hemlock stands. The wooded portions are generally found on the site's steeper slopes. Three major brooks and two minor brooks flow through the site.
- **Ponds:** The site has seven ponds: one fed by Peck's Brook, three fed by groundwater, and three recharged by surface runoff. The site also has a wet meadow in one of the abandoned fields and wetland areas in the swales and drainage ditches of the former golf course.
- **Soils:** Predominantly compact, fine-grained glacial tills derived from limestone and schist. The till-derived soils have a shallow hardpan layer that generally supports perched groundwater, and contain some cobbles and occasional boulders within a loam matrix. Soils range from mucky silt to sandy and stony loam.
- **Rare Species Habitat:** Several plant and animal species on the site are listed as rare or endangered by the Commonwealth of Massachusetts and their habitats are protected by State law. None of the wildlife or plant species listed by the U.S. Fish and Wildlife Service as endangered or threatened is known to inhabit the site.
- **Roads:** Frontage on and direct access to site is available along Gould Road, Thiel Road and West Mountain Road. West Mountain Road is owned and maintained by the Town of Adams. Road maintenance and snow removal is provided by the Town of Adams for the Gould and West Mountain Roads to provide public access to the Gould Farm and to the Greylock Greenhouses.

Map of Greylock Center Site

Adams, Massachusetts



1 mile
1 kilometer



- **Electric Service:** Massachusetts Electric Company maintains a 23 KV line from West Road crossing the site to the Gould Farm, where it steps down to the 2.4 KV summit line. A Massachusetts Electric Company 115 KV line runs in a 250-foot wide easement that crosses the eastern edge of the property. Overhead electric service runs along West Mountain Road in the vicinity of the property.
- **Water Service:** An 8" municipal water main runs along West Street. A 500-GPM electrically driven potable water pumping station which is in poor condition, exists near the intersection of Gould Road and West Road. An 8" water main installed during the prior development effort in the 1970s, extends part-way up Thiel Road. Its condition, however, is undetermined.

The Adams Fire District provides the municipal water supply, which has an average load of 2.03 million gallons per day (mgd). The current pumping capacity at the source is 4.95 million gallons per day.

- **Sanitary Sewer:** A municipal sewer line extends to the intersection of Thiel and Gould Roads. An 8" vitrified clay sewer line extends along Thiel Road, but its condition is undetermined.

The Adams municipal waste-water treatment plant has a design capacity to accommodate 10 million gallons per day and is currently working below optimal flows.

- **Natural Gas:** Natural gas is not presently available to the site. Extending the lines located on West Road could be made through arrangements with the Berkshire Gas Company..
- **Golf Course Improvements:** An 18-hole, par 70 golf course, designed by Cornish-Robinson, was built and operated on the site for two years in the mid-1970s despite the lack of a club house. The course is now in disrepair although part of the sculptured earth and loam could be utilized in a new design or golf course restoration activity.
- **Other Site Improvements:** Building improvements include a 7,100 square foot, one-story, metal-framed maintenance garage that is in fair condition. Numerous incomplete facilities associated with former development include: a concrete water storage tank, foundations and sunken concrete and steel

piers for a hotel and a condominium development that were not completed, and numerous steel ski lift towers and lights with concrete bases.

- **In-Parcel Easement and Rights-of-way:** On West Mountain Road, about one quarter of a mile from its terminus, is a 2.6 acre parcel of land owned by Thomas and Paulette Morin on which they live and operate a greenhouse business called Greylock Greenhouses. This parcel is surrounded by lands comprising the Greylock Center site and has flowage rights from an adjoining stream dam for use in its greenhouse operation. Utility and public access via the West Mountain Road must be maintained although utility and road alignments may be altered.
- **"Abutting Reservation Land":** Included in the 1,063 acre Greylock Center site described by this RFDP is a 99 acre portion of the Mount Greylock State Reservation which is available for lease only and can be used for ancillary activities to support the mission of Greylock Center. The location of this parcel is shown on the map of the Greylock Center site.

C. REQUEST FOR DEVELOPMENT PROPOSAL PROCESS

The request for proposal process for the Greylock Center property will proceed on the following basis:

- (1) Submission of proposals from developers;
- (2) Threshold Review of all submissions against the minimum requirements of the RFDP;
- (3) Comparative Review and ranking for those submissions which pass the minimum thresholds outlined by the RFDP;
- (4) Presentations and interviews of top ranked proponents;
- (5) Conditional designation of a developer;
- (6) Negotiation of development agreements, and completion of lease(s) or purchase & sale agreements and completion of site and phasing plan;
- (7) Pre-construction development permits to accommodate development site and phasing plans; and

- (8) Ground lease or sale transaction and other closing matters leading to initiation of construction.

The schedule for designating a developer for the property is presented below.

Disposition Milestones	Completion Date
Proposal Submission Deadline	May 22, 1996
Proposal Reviews	June 7, 1996
Proposal Presentations	June 25-6, 1996
Conditional Developer Designation	July 27, 1996

D. DISPOSITION TERMS AND CONDITIONS

The Commonwealth is soliciting proposals by developers to lease or buy, and develop the Greylock Center property subject to the process detailed herein.

The Commonwealth has also committed \$6.5 million of public investment as detailed by this offering. The public funds will be utilized to improve the Greylock Center site or the "Abutting Reservation Land" as defined in Chapter 676 of the Acts of 1985. These public funds may be used for recreation amenities, infrastructure, pilot programs (e.g., sustainable development demonstration activities), and equipment. No public-funded building construction projects are anticipated to be built on the site.

The public investment will be considered to be public works; therefore public bidding requirements as well as prevailing wages will apply. The Department of Environmental Management will contract for and oversee the "public works" aspects of the project, the design of which will be closely coordinated with the developer's site and building plans. Under current law the developer will not be allowed to construct the public works component at the site. Buildings and site infrastructure within the area leased or sold to the developer may be designed, built, financed, and operated by a private development party.

Public infrastructure components that could be funded by the Commonwealth include at a minimum the following:

Site Infrastructure, such as:

- Roads,
- Water Mains,
- Sanitary Sewer Lines,
- Electric Conduits,
- Water Wells,
- Booster Pump, etc.

Trails and Trailheads, such as:

- Wellness Trail,
- Hiking Trails,
- Bridle Trail,
- Mountain Bike Trail,
- Nature Trail,
- Cross County Ski Trails,
- Bicycle Touring Trail, etc.

Outdoor Recreation Areas & Facilities, such as:

- Golf Course,
- Tennis Courts,
- Special Event Field,
- Swimming Pond,
- Sledding and Tobogganing Area,
- Campground,
- Group Campground, etc.

The use of Commonwealth funds to support the development and/or operation of pilot programs that explicitly further the educational and environmental objectives of the project is also allowed. However, developer's who propose to use the Commonwealth's investment in this way must demonstrate that the funds are not simply being used as a long term operating subsidy.

The Commonwealth agrees to lease a portion of the 99 acre parcel adjoining the site known as the "Abutting Reservation Land" of the Mount Greylock State Reservation, as shown on the map of Greylock Center Site, for those recreational, residential and commercial uses necessary or appropriate to implement the master plan and the purposes of the act; provided, however, that the Mount Greylock State Reservation shall remain open to the public and no user fee shall be paid to any private parties involved in the operation of the abutting reservation land for the use of Mount Greylock State Reservation, except for the use of ski-touring trails. In no event may the abutting reservation land be permanently alienated.

All developer inquiries and proposals responding to this prospectus shall be directed to:

Stephen Brown
Greylock Center Project Manager
Department of Environmental Management
100 Cambridge Street - Room 1404
Boston, Massachusetts 02202
(617) 727-3160 Extension 521
Fax: (617) 727-2630
E-mail: SBrown_DEM_Boston@state.ma.us

E. DISCLOSURES AND LIMITING CONDITIONS

Per executive Order Number 346, Department of Environmental Management and Division of Capitol Planning and Operations employees assigned to the Greylock Center project are prohibited from seeking employment with the successful proponent for a period of five (5) years.

This request is subject to the process outlined within this Request For Development Proposals. While all information furnished herein was gathered from sources deemed to be reliable, no representation or warranty is made as to the accuracy or completeness thereof. Prospective developers should undertake their own review and reach their own conclusions concerning zoning, physical conditions, environmental concerns, required approvals, reuse potential, and other development and ownership considerations.

This Request For Development Proposals is made subject to errors, omissions, prior lease, sale, financing, or withdrawal without prior notice. In no way does this obligate the Commonwealth to select a developer, nor does it exclude the potential for selecting alternative uses.

Massachusetts law requires that final design plans and architectural drawings for the project bear the stamp of the appropriate Massachusetts-registered design professional. The designated development team must take steps following designation to obtain such registrations.

Proponents will be asked to provide any information regarding any legal or administrative actions past, pending, or threatened which could relate to the conduct of the proponent's (or its principal's or its affiliate's) business and/or their compliance with laws.

Disclosure is required of any past or present affiliations of the proponent, proponent team members or proponent employees with the Massachusetts Department of Environmental Management, the Division of Capital Planning and Operations or with the Weld/Cellucci Administration. Please describe the nature and duration of the affiliation. Also include a disclosure of existing or past public contracts in Massachusetts, describing the contracting parties, scope of the contract and period of performance (Section 40-J of Chapter 7).

In its selection of a proposer or proposers, the Commonwealth reserves the right to negotiate with any and all proponents, including single proposers or development teams, (including without limitation by negotiating with all

or a combination of different development teams), to waive portions of the RFDP, and to waive any informalities in proposals.

The Commonwealth reserves the right to select a single proponent or multiple proponents. The Commonwealth also reserves the right, with the consent of the authorized representative of the lead proponent of a team, to negotiate with one or more of the team members.

Prior to the execution of the disposition agreement conveying any of the lands to a third party , a Massachusetts Environmental Impact Report must be approved by the Secretary of the Executive Office of Environmental Affairs.

The property is presented in "as-is" condition, with no representations or warranties by the Commonwealth.



II.

Development Guidelines

This Development Guidelines section of this RFDP describes the Commonwealth's priorities and preferences relative to how Greylock Center will be developed.

A. LAND USE GUIDELINES

Two distinct and simple land-use categories establish the physical parameters for development on the site, each representing an increasing intensity of use. These land-use categories were based on the natural resource inventory completed by the Center for Ecological Technology and the land use planning advise of Sasaki Associates, Inc.

Development teams shall strive to match development programming to the site in a way that respects the objectives of each land use area as described below and shown on the accompanying map. More specific guidance regarding program siting and the development's design is provided in the following section of this RFDP. Additional detail concerning land use issues is also provided in the Greylock Center Master Plan.

ABBREVIATED LAND USE GUIDELINES*

AREA #	LAND USE CATEGORY	PERMITTED
Area I	Recreation and Resource Management Area	Hiking, cross-country skiing, picnicking, horseback riding, small scale facilities and structures that support extensive recreation and sustainable development
Area II	Development Area	Intensive recreation areas such as those associated with the golf course; any substantial structures; support facilities, such as parking and maintenance buildings

* See Master Plan for complete description of land areas.

LAND USE DESIGNATIONS, WETLANDS AND SPECIAL AREAS

EXPLANATION

From Greylock Center
Master Plan

Development area

Recreation and resource
management area

From field studies

Wetlands

Ponds and other small waterbodies

Rare plant species location, extant

Rare plant species location, historical

Vernal pool

Appalachian Brook crayfish

Spring salamander

Mourning warbler

Eastern elderberry longhorn beetle

Habitat-Appalachian Brook crayfish

Habitat-Appalachian Brook crayfish and
Spring salamander

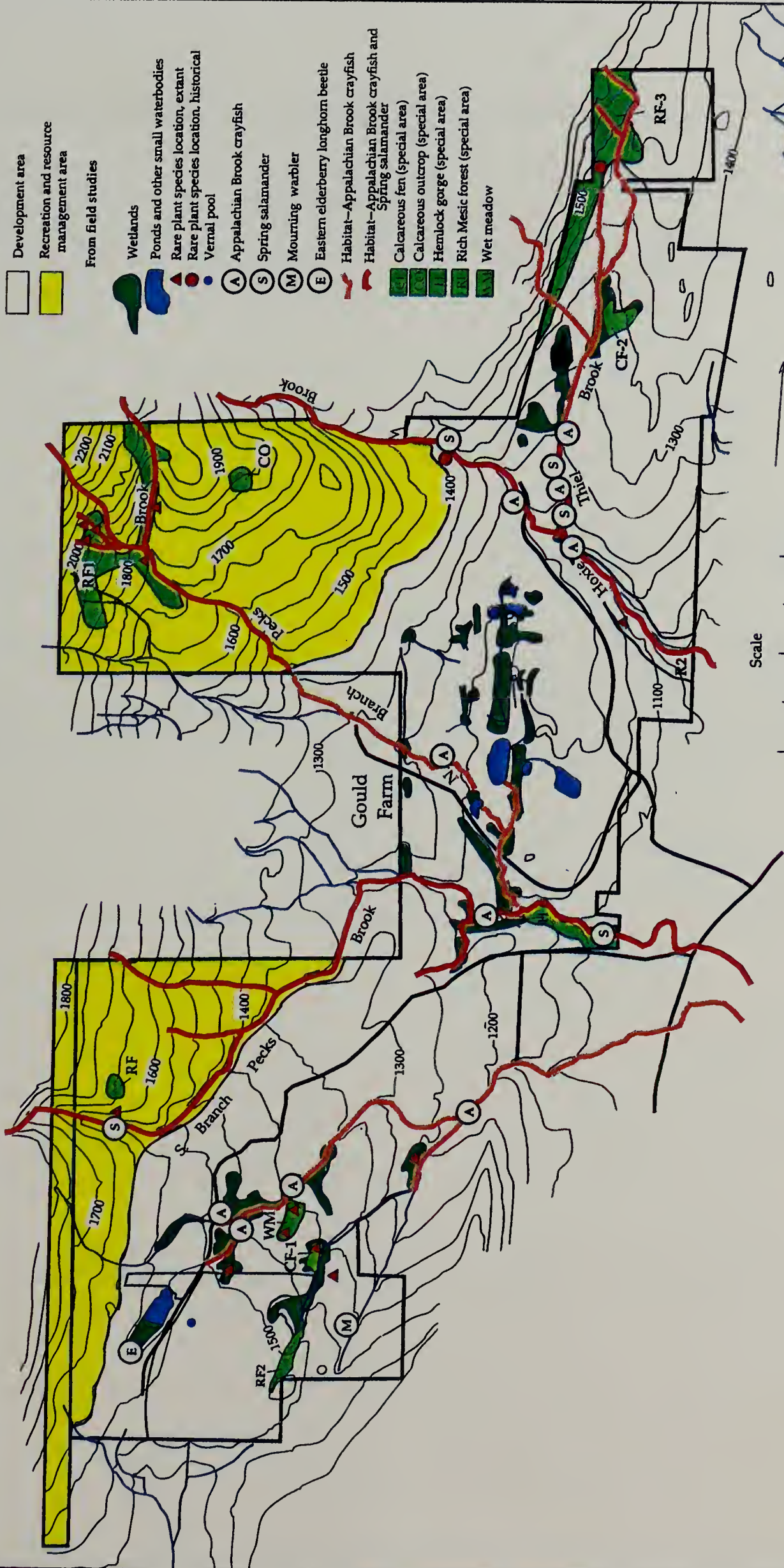
Calcareous fen (special area)

Calcareous outcrop (special area)

Hemlock gorge (special area)

Rich Mesic forest (special area)

Wet meadow



Scale

0 500 1000 2000 Feet

Contour interval 50 feet

B. DEVELOPMENT PROGRAMMING GUIDELINES

The Commonwealth recognizes that the final development program can not be completed without a designated developer. In recognition of this, the Commonwealth will reward proponents who have the capabilities and capacities to carry out the project in a consultative manner to create a final development plan which would achieve the following objectives:

- Market feasibility,
- Economic vitality at both the micro and macro levels,
- Environmental sensitivity,
- Minimizes risk & public subsidy, and
- Maximizes opportunity.

These five objectives set the ultimate performance measures through which the best development team will be found and the best Greylock Center project built.

Development program requirements for the Greylock Center site reflect the Commonwealth's goals as described by this RFDP. It is asked that proposals address all of the required uses and the rationale for the scale of development proposed. Proposals which fulfill the Master Plan goals and objectives with the least environmental impact will be favored.

Project phasing is permitted. If phased development is proposed, a listing of initial program elements is requested as is a phasing plan showing how total program requirements will be met. Any proposed project must contain the critical mass of activities needed to ensure year round operation.

Certain items are allowed under specific conditions. Expansion of the golf course from 18 to 27 holes is allowed if such expansion is done in an environmentally sensitive manner and does not detract from other intended, equally important uses of the site. Residential units are allowed if the residential units relate to other project components and support the programming & curriculum offerings of Greylock Center and the units provide financial benefits to the development and the Town of Adams and the region.

Other suggestions and options will be considered as long as they are not specifically prohibited and are consistent with the overall mission and approach presented by the Greylock Center Master Plan.

The Master Plan provides the performance thresholds and development parameters for the RFDP. The Master Plan is not intended to suggest or propose a preferred schematic design for the project.

A program accommodation plan developed by Sasaki Associates, Inc. can be found in the Appendix. This accommodation plan shows how the required development program with an expanded program of 9 additional holes of golf and 300 residential units could be accommodated on the site. This program accommodation plan is one development scenario among many possible site plan solutions.

Prohibited items include:

- Alpine skiing on the site,
- Construction of aerial tramway, chair lifts, or associated downhill ski facilities extending onto the Mt. Greylock State Reservation,
- Large scale retail or commercial development, and
- A motorized recreational vehicle trail system.

DEVELOPMENT PROGRAMMING GUIDELINES

PROGRAM COMPONENTS	PROGRAM ELEMENT REQUIREMENTS	OPTIONAL ELEMENTS
LODGING, RESIDENTIAL & HOSPITALITY	<ul style="list-style-type: none"> • Conference Center (Maximum of 200 Units) • Indoor Recreation & Fitness Facility • Special Event Area 	<ul style="list-style-type: none"> • Residential Units - Attached & Detached • Commercial Space • Indoor Wellness Center • Rustic Cabins • Campsites
SUMMER RECREATION	<ul style="list-style-type: none"> • Golf Course • Trailheads • Recreation Trails • Outdoor Swimming 	<ul style="list-style-type: none"> • Tennis Courts • Play Field • Fitness Trail • Walking Trails
WINTER RECREATION	<ul style="list-style-type: none"> • Cross Country Skiing • Sledding & Tobogganing • Lighted Skating Area 	<ul style="list-style-type: none"> • Telemark & Norpine Skiing • Snowmaking on 15 Km of Trails • Snowmobile Connector Trail
EDUCATION & NATURE RECREATION	<ul style="list-style-type: none"> • Program Staff • Year Round Programs • Interpretive Nature Trail 	<ul style="list-style-type: none"> • Institute/Thematic Learning Center • Conference & Meeting Space • Welcome & Interpretive Area • Training Facility • Research Demonstration Area • Environmental Education Center • Group Camping

C. SITE & BUILDING DESIGN GUIDELINES

One of the Commonwealth's most important concerns in the development of the site is that the highest quality of physical planning and design be applied in all phases of the project. **The quality of each applicant's demonstrated planning and design capability will be a major factor in the selection of a development team for Greylock Center.**

In order to ensure the highest quality of design at Greylock Center, the Department of Environmental Management has established a Site & Building Design Committee to review and evaluate the submissions of all respondents. This is a committed group of well qualified professionals who will also serve as advisors.

Because of the commitment to sustainable development the following guidelines are offered for guidance:

MAJOR DESIGN PRINCIPLES AND GUIDELINES:

- Preserve the integrity of the site's natural resources
- Design for resource conservation & enhancement
- Promote the wise use of renewable resources where feasible
- Integrate the concept of recycling into all aspects of the project where feasible
- Arrange land uses in a manner which complement each other and enhance special land characteristics and provide buffers as necessary
- Encourage and improve connections among the site, the Town of Adams, and the Mt. Greylock State Reservation
- Buildings and site design should reflect a village approach to land use patterns where feasible
- Lodging, recreation, and education facilities should demonstrate attractive, compelling and appropriate architectural and landscape designs
- Building designs and uses, materials, solar orientations, and other architectural treatments should help provide comfort and a better sense of well being for the users of the facilities

- Interpretation and demonstration areas and facilities should be designed into Greylock Center as needed and appropriate for the education of visitors

A more detailed description of the site and building guidelines can be found in the Appendix.

Development teams are also encouraged to obtain a terrific booklet titled "Sustainable Development at Greylock Center: Applications and Guidelines" which has been produced by the Center for Ecological Technology of Pittsfield, Massachusetts. This booklet is contained in the Supplemental Information Package which is available upon request.

D. Conference Center/Program & Curriculum Development Guidelines

Greylock Center has the potential to be a comfortable and compelling destination development for people to convene, to learn, and to recreate.

The Commonwealth, along with key members of the Greylock Advisory Committee will work closely with the designated developer to refine the programming, funding and partnering necessary to make the conference center a place of excellence.

Many projects and programs can fit within the broad tent of conference center/program & curriculum development. The best focus for the program effort will be that provides the greatest public benefit, potential for funding and positive impact on the other development components of Greylock Center. Personal enrichment, wellness programs, professional training curriculum and many other types of programming may be possible. It is possible to imagine guests enjoying a whole range of personal, professional, recreational, lodging, and educational options.

A critical part of the RFDP will be the work plan for the solidification of the conference center/program & curriculum development, especially an institute. A \$50,000 dollar-for-dollar matching fund has been dedicated to support the collaborative process with the designated developer to create this capacity, whether it be an institute, thematic learning center or a new approach yet to be mutually derived. Some of the key challenges are as follows:

- Obtaining corporate sponsorship;

- Making linkages with strong educational institutions so that there will be ongoing research, testing, training and programming on projects related to sustainability;
- Establishing memberships and affiliations that will provide ongoing financial support; and
- Keeping the educational programming open and very accessible to visiting guests and participants at the golf course and other activity areas found on the site.

The creation of the conference center/program & curriculum development portion of the project will be a challenge for any development team. The Commonwealth understands this and recognizes that other Commonwealth agencies such as the Office of Business Development, The Massachusetts Development Bank and key Commonwealth educational institutions will be involved, even more than they currently are. With a private developer partner designated, the development plan for this portion of the project should move forward deliberately and expeditiously in four to six months.

The level of commitment shown in proposals to the specifics of these guideline and the early action steps set out will be major factors in the eventual selection of a developer for Greylock Center.

E. MANAGEMENT AND OPERATIONS GUIDELINES

The management and operational plan for Greylock Center developed by the designated developer should strive to demonstrate the following operating procedures and principles. Further details on these matters can be found in the Master Plan.

Proponents that demonstrate the relevant experiences and a clear understanding of these guidelines will be favored.

Economic Development: Promoting employment outreach to the local region and utilizing locally produced goods and services is encouraged.

Recreation: Operation of the recreation facilities (active and passive) should be geared to regional utilization and should allow for accessibility by Greylock Center guests and the public-at-large, especially those who reside in the Town of Adams. Proponents at the time of the interviews should be

prepared to discuss the issue of public access and be prepared to suggest how the interface between public and private utilization will be balanced.

Sustainability: Development teams need to demonstrate how they will promote and integrate the concept of sustainability throughout the construction, operation and marketing of the project. The guidelines for Greylock Center call for efforts to minimize energy, resource consumption and material waste and actively promote alternative energy use, recycling, and innovative use of renewable resources.

Environmental Protection: Development teams should promote environmental protection especially with respect to endangered species and other sensitive wildlife and vegetative habitats.

Project Integration: The development team is encouraged to stress the interconnection of program components and project objectives. The Greylock Center should be thought of as a whole. Physical, programming and marketing linkages within the project are encouraged.

Linkages: Ideally, Greylock Center should tie into the Town of Adams, the Mount Greylock State Reservation, and the Berkshires. The Commonwealth encourages linkages of the Greylock Center site with the neighboring 11,611 acre Mount Greylock State Reservation. Linkages could include trail use, environmental education programming, field research, and on a case-by-case basis, demonstration of renewable resource management practices, so long as those activities are consistent with the reservation's management plan. Where it is mutually beneficial, programmatic, marketing, and physical linkages with the Town of Adams should also be explored.

Education: The provision of educational opportunities that promote individual, societal, and ecological well-being is an integral part of Greylock Center's mission. The operation of Greylock Center could teach by example by making the operation of the site as visible and accessible as practical.

F. FINANCIAL GUIDELINES

Proposals for the redevelopment of the Greylock Center site are asked to address the following financial guidelines.

Market Feasibility: The development proposal should document sufficient market demand to make the project feasible.

Economic Feasibility: Development proposals must be financially feasible with the capacity for long-term economic viability. Operating subsidies will not be provided by the Commonwealth except for mutually agreed upon elements that have a public recreation/education component associated with them, such as trails that connect to the Mount Greylock State Reservation and trailhead parking areas.

Financing Feasibility: Private investment in the property including both private debt and private equity finance will be a requirement of the project. Proposals are asked to demonstrate the respondent's ability to finance the project, both the physical elements of the project as well as the working capital needed to make Greylock Center successful. A description of proposed project funding sources and uses is requested. The extent and nature of other anticipated federal, state, local, and not-for-profit investment being applied is required, including the \$6.5 million currently available.

Transaction Terms: The Commonwealth will entertain proposals to sell a fee interest in the Greylock Center site or an interest in the underlying land at Greylock Center by means of a long-term, financeable ground lease contract. An additional 99 acres of land in the adjoining Mount Greylock State Reservation is also available for lease (not for sale) in support of the project. No minimum acceptable price or rental rate has been established for the property. Proposals shall include the recommended business terms and conditions for purchase and/or land lease agreements. Proposals that best address the Commonwealth's goals for the project will be favored.

Ownership Identification and Structure: It is the Commonwealth's desire to enter into an agreement with a single entity. Proposals shall describe the structure of the ownership entity anticipated to hold ownership interests in the property. Additional information should indicate the names, addresses and business affiliations of all principles, disclosure of all parties who may have a direct or indirect financial interest in the project, whether the ownership entity is expected to be an individual, a partnership, a corporation (profit or non-profit) or a joint venture and the jurisdiction under whose laws the ownership entity is or would be organized.

G. TEAM COMPOSITION AND QUALIFICATIONS GUIDELINES

Given the complexity of the proposed project, it is anticipated that multi-talented teams of professionals will be formed to respond to this Request For Development Proposals. Proponent teams or firms for the redevelopment of the Greylock Center site shall demonstrate the following expertise:

- Development and construction management
- Site and building design
- Financing
- Marketing
- Operations management
- Program and curriculum development, especially in a conference center setting
- Institute development

All members of the development team need to demonstrate experience with large scale, mixed use development including conference center, hospitality, recreation and golf uses. Experience with sustainable development and operation is highly desired. Experience with conference center development and operations is essential. Experience in the areas of recreation, education, institutes/themed learning centers and the provision of hospitality services is required.



III.

Submission Requirements

Specific submission requirements are detailed below. These requirements are designed to assist the Commonwealth in selecting which proponent to be the designated developer for Greylock Center. Each proponent is invited to submit any additional information that may improve the proposal quality as it relates to the established criteria.

The Commonwealth reserves the right to interview any and all proposers. The Commonwealth reserves the right to waive portions of the Request for Development Proposals, to waive any informalities in proposals, or to reject any and all proposals for any reason deemed appropriate, in order to serve the best interests of the state.

A. LETTER OF INTEREST

All proposals must include a letter of interest signed by the principals and describing the proponent's interest in the property and general intentions concerning the development of the site.

- The name of the representative authorized to act and speak for the proponent should be identified and the following information provided: address, telephone number, and fax number;
- All proposals shall describe the roles that each member of the development team would play in implementing the Greylock Center project and include their address, telephone number and fax number;
- If the proponent is not an individual doing business under his/her name, the submission must describe the status of the organization (whether a non-profit or charitable institution, a venture, a corporation, a business association, or a joint venture), and indicate the jurisdiction in which it is registered to do business; and,
- Identification of all principals, partners, or co-venturers participating in the transaction and the nature and share of the participants' share in the project should be described.

B. PROPOSAL NARRATIVE AND PROGRAM DESCRIPTION

All proposals should include narrative that describes their proposed project and its compliance the Greylock Center Master Plan and the development guidelines and objectives articulated in the threshold and comparative criteria contained in the RFDP. The narrative should be considered a business plan that addresses all issues of relevance and provides a road map showing how you intend to get from the start-up point to full development. Provide a broad brush overview of the proposal, the market niche the project intends to serve, the experience and qualifications of your team, and the capabilities you can marshal to achieve your objectives. It is requested that this document be concise and be in outline form as follows:

I. EXPERIENCE/QUALIFICATIONS OF TEAM

- for Developer
- for Architectural and Landscape Design
(Use Federal Standard Form 255)
- for Education and Curriculum Development
- for Conference Center and Institute/Thematic Learning Center Development

II. CAPABILITY TO COMPLETE THE PROJECT

- Financial qualifications of developer/proposer
- Feasibility of proposal
- Financial Terms and Conditions
- Early Action Program

III. FULFILLMENT OF THE MASTER PLAN

- The Vision
- The Mission
- The Project Goals and Objectives
- Development Programming Guidelines
- Site & Building Guidelines
- Conference Center/Program & Curriculum Development Guidelines
- Management & Operations Guidelines
- Financial Guidelines

In addition to the above proponents may also wish to include a narration on each of the following important issues:

- Description of tactics to be employed to create a strong, ongoing demand for Greylock Center in general and the conference center in particular.

- How you propose using the \$6.5 million of public investment as well as other federal, state, local and not-for-profit investment, if planned for, will be utilized.
- Description of development components that will be operated for private membership versus public use.

C. DEVELOPMENT COST, OPERATING AND FINANCIAL PROFORMAS

Proposals will need a plan showing how market, financial and financing feasibility will be achieved. The plan should provide a framework for understanding the financial strategy and should contain estimated development costs (at a macro level) and a projected stabilized operating income and expense statement for the project. Specifically, submissions are asked to include the following:

- Preliminary development budget (and phasing plan if proposed) for any improvements to be made;
- Statement of the proposed method of financing the project and sufficient information to demonstrate the developer's ability to finance the project;
- Capital budget detailing proposed sources and uses of funds including assumptions regarding use of Commonwealth or other public sources of funds;
- Stabilized operating Income & Expense Proforma and sales analysis with a listing of key assumptions used in their determination; and
- Amount and utilization of equity being proposed.

D. FINANCIAL PROPOSAL, TERMS AND CONDITIONS

Provide a general description of the proposed structure of the deal and proposed business terms. Specific business terms of interest include the following items:

- Fee simple purchase or ground lease options for various development component areas within the Greylock Center site.
- Proposed purchase price or annual rental payments for land or possible methods to be utilized for determining such price or rent.

- A proposed profit sharing structure, if any, for the Commonwealth to participate in any profits derived from subletting or assigning a ground lease interest or from subsequent dispositions.
- Recommendations on how revenue producing development components (golf and residential) could be used to assist the non-revenue producing development components (the conference center). How this cross subsidy could be structured and managed.

E. MANAGEMENT AND OPERATIONAL PLAN

All proposals are asked to provide a description of the organizational structure of the development team.

Proponents are also encourage to provide a narrative that discusses the following issues:

- Employment outreach to the local region and the utilization of locally produced goods and services;
- Public access and how public and private utilization will be balanced;
- How sustainability could be promoted in the operation and marketing of the project and how management would strive to minimize energy, resource consumption and material waste and the use of nearby renewable resources;
- How environmental protection could be promoted, especially with respect to endangered species and other sensitive wildlife and vegetative habitats; and,
- How the program components and the Greylock Center's goals and objectives could be integrated and optimized.
- How effective communications between the Commonwealth, the Town of Adams, and the development team during all phases of the project could be maintained.
- Management philosophy and techniques that could be applied to the day-to-day operation of the facility.

F. CONCEPTUAL PLANS

Conceptual Plans for the Greylock Center Site:

All proponents shall prepare a conceptual site plan that illustrates their thinking on how the Greylock Center site should be developed. Proponents should feel free to use the accommodation plan developed by Sasaki Associates, Inc. to help them develop their own site plan.

Specifically, the following is requested:

- Illustrative site plans at 1" =400' drawn on the provided base map, and showing:

Probable placement of program elements on the site, anticipated organization of built spaces, internal circulation, relationship to abutting uses, treatment of environmentally sensitive areas, views, etc and how the proposal fulfills the master plan.

Proposed location of proposed buildings, roads, amenities, parking areas, trails, utilities, wetland modifications or creation, restoration or sustainable development demonstration areas, etc.
- Narrative on how the site and building guidelines and sustainable development guidelines will be integrated into the project and how the proposed plan fulfills the master plan.
- Submit any other presentation materials that would help in portraying the design intent and other perspective drawings to adequately illustrate key features of the development.

Site And Building Plans of Comparable Projects:

In order to assess the architectural and landscape design and development capabilities of proponents and their vision of the project, examples of prior work done on comparable projects is required. Specifically, the proponents may wish to submit the following materials:

a) Selected conceptual site and building plans of comparable properties that the team has developed and/or designed showing the placement of program elements on the site, anticipated organization of built spaces, internal circulation, relationship to abutting uses, treatment of environmentally sensitive areas, views, etc

In addition the following are suggested:

- Conceptual plans of a conference center and all related improvements.
- Conceptual plans of a golf course club house and related improvements (maintenance facilities, pro shop, caddie areas, etc...).
- Conceptual plans or architectural renderings of residential units. This could include any time share facility, condominium, or single family homes.

b) Provide illustrations, photos, descriptions of sustainable development technologies/approaches etc. that have been integrated into other projects you would like to emulate.

c) Submit any other presentation and design materials that would help in portraying the design intent of other comparable projects you would like to emulate.

Also submit a current audited balance sheet and three (3) year history of income and expenses for the lead proposing developer and any component developer(s) who will participate in the project should be submitted.

G. DEVELOPMENT IMPLEMENTATION PLAN AND PROJECT TIMETABLE

All proposals shall provide an overall proposed timetable for the implementation of the project. The description should include:

- Key milestones and projected opening dates for major development components (best case & worst case);
- Projected timing for obtaining needed to arrange financing and attain regulatory approvals; and
- Early actions steps proposed.

All proposals should provide examples of how the team has successfully implemented other development projects.

H. FINANCIAL QUALIFICATIONS AND REFERENCES

In addition to information provided under Section C. Please provide descriptions of similar type projects which have been successfully undertaken by the proposer or component developer(s). Include project references as well as banking references.



IV.

Proposal Review and Developer Selection Process

A. DEVELOPER SELECTION PROCESS AND TIMETABLE

STEP I: THRESHOLD REVIEW

All proposals will first be subjected to a preliminary screening for adherence to the Commonwealth's submission requirements. The Commonwealth may reject any proposal that does not include the appropriate submissions or does not meet the minimum threshold criteria. The Commonwealth reserves the right to request clarification and further material on material submitted.

STEP II: COMPARATIVE REVIEW

Proposals that meet the basic pre-screening standards mentioned above will be reviewed for consistency with the Commonwealth's development guidelines, preferences and priorities as described by this RFDP. Proposal evaluation criteria are outlined in the following section of this offering prospectus. Innovative proposals which are consistent with the Master Plan will be rewarded.

STEP III: PRESENTATIONS AND INTERVIEWS

Following the review of written proposal submissions and presentations and interviews with selected proponents will be held.

Proponents will be interviewed by the Developer Selection Committee. The design team of the top ranked proponents will be interviewed by the Site and Building Design Committee.

Following the interview process, the Commonwealth will undertake a final ranking of development proposals and a designated developer will be selected, conditioned on the successful negotiation of development and lease or sale agreements.

STEP IV: DEVELOPER NEGOTIATION AND PRE-DEVELOPMENT ACTIVITIES

The Commonwealth will work with the designated developer to negotiate and execute a development agreement to guide the implementation of the project, including specific provisions for permitting, approvals, financing, design review, scheduled milestones, deposits, and the basic structure of a lease, as well as terms and conditions pertaining to any transfer or lease of the site to the developer.

The Commonwealth will work with the developer, as mutually agreed to, on pre-development activities such as the early action program, streamlined permitting activities, and program, curriculum and financing development.

Prior to the execution of a final ground lease or sale contract, the designated developer must secure all appropriate permits and approvals required for the agreed upon development. This includes the filing of an Environmental Notification Form (ENF) and a Massachusetts Environmental Policy Act (MEPA) review.

The developer will be required to develop a recordable site and building development plan, prepared by an appropriately licensed professionals, prior to the disposition of the lands.

STEP V: GROUND LEASE OR SALE TRANSACTION CLOSING

Following the completion of necessary pre-development activities, the ground lease agreement will be finalized and leasehold title will be transferred to the designated developer of the project.

B. PROPOSAL EVALUATION CRITERIA AND PRIORITY RANKING

The basic evaluation criteria to be used by the Commonwealth in evaluating the proposals are outlined below and emphasize the importance of the proponent's qualifications and directly analogous experience and the proponent's demonstrated ability to complete the transaction, including the ability to obtain financing and all necessary approvals. Proposers need to "Pass" all items in the Threshold Review. Proposers successfully passing all Threshold Review criteria will advance to the second step, that being the Comparative Review.

THRESHOLD CRITERIA

RATING

EXPERIENCE/QUALIFICATIONS	P/F
<p><u>Development Team:</u></p> <ul style="list-style-type: none">● Prior development, financing, management, operation, programming and marketing experience with similar development components and facilities (i.e. conference center, golf course, recreation areas and facilities) <p><u>Architectural and Landscape Design Team:</u></p> <ul style="list-style-type: none">● Designation of a prime design firm that has had five years of experience in the provision of recreation, resort, conference, and/or education design services.● Design development team, should as a minimum, includes the following licensed and registered design professionals: surveyor, architect, landscape architect, and professional engineers. In addition, at a minimum the team should also include a golf course architect. <p><u>Education and Curriculum Development Team:</u></p> <ul style="list-style-type: none">● Identification of key members of the education and curriculum development team, whose members have demonstrated competence in the development of year-round educational programs for the benefit of guests and visitors, especially in a conference center setting.	
CAPABILITY TO COMPLETE THE PROJECT	P/F
<ul style="list-style-type: none">● Realistic financial terms and conditions that identify how the proposed project will be developed and operated, and the funding strategy that will be employed to secure the necessary funds to make the project a success.● A development strategy on how the project will be successfully implemented.● A stated commitment to the execution of an early action programming/marketing program.● Financial qualifications, including net worth.● References that document proven experience in funding projects of a similar scale.	
FULFILLMENT OF THE MASTER PLAN	P/F
<ul style="list-style-type: none">● Proposed project is an integrated, appropriately-scaled, full-service conference resort, recreation and education center that promotes individual, societal, and ecological well-being and operates year-round.● Fulfillment of the development programming guidelines.● Proposed project illustrates the concept of sustainability will be integrated into the program, design, management, and ongoing operation of Greylock Center.	

COMPARATIVE REVIEW CRITERIA

EXPERIENCE/QUALIFICATIONS (MAXIMUM POINTS: 30)	Points
<u>For Development Team:</u>	10
<ul style="list-style-type: none">• Qualifications of key persons/consultants• Prior financing experience, especially in private/public ventures• Proven ability to integrate diverse program elements into a coherent development plan• Past performance on similar projects, especially with conference centers• Commitment of the team to sustainable development and environmental education• Past experience on permitting a major project, particularly in Massachusetts• A proven ability to develop a compelling vision for a development project• A proven ability to assemble the resources needed to complete the project successfully• Creativity and ability to work effectively with a variety of audiences• Prior experience in developing a major project that has high public visibility• Proven experience in golf, inn/lodging, and winter recreation development	
<u>For Architectural and Landscape Design Team:</u>	10
<ul style="list-style-type: none">• Successful prior working relationships and integrated efforts among team members• Experience in planning, designing, and constructing complex, multi-faceted projects• Experience in large scale conference resort, recreation, and education projects• Experience in low impact environmental design and construction• Architectural experience in conference center design as well other building types• Golf architectural experience in designing environmentally-sound USGA golf courses• Experience in the design and development of recreation areas and facilities• Experience in large scale land use planning, especially in component integration• Experience in environmentally sensitive design, especially large scale projects• Commitment of the team to sustainable design and development• Past performance of team on public/private projects	
<u>For Education and Curriculum Development Team:</u>	10
<ul style="list-style-type: none">• Qualifications of key personnel/consultants• Depth and capability of proposed team• Past performance on developing educational programming in a conference center• Proven ability to develop collaborative programming among diverse education providers• Proven ability to effectively utilize a variety of educational technology• Proven leadership in the areas of sustainable development, environmental education, leisure education, and wellness.	

CAPABILITY TO COMPLETE THE PROJECT (MAXIMUM POINTS: 30)

Financial Qualifications of Developer: 15

- Proven comparable financing experience
- Financial capacity, based on net worth and current financial obligations
- Proven ability to develop and execute a fundable financing plan, particularly in the Northeast
- Proven sources of equity investment
- Proven sources of asset-based lending
- Amount of working capital available to fund an early action program and build the required marketing demand for the project in order for it operate profitably over the long run
- Amount of equity being brought to the project

Feasibility of Project: 15

- Credible business plan & marketing strategy to create a visitor destination area at the site
- Track record of successful development, profitable operation, and successful marketing of similar facilities
- Track record in creating and following through an agenda for early action
- Proposed financial terms and conditions for the execution of the disposition agreement

FULFILLMENT OF THE MASTER PLAN (MAXIMUM POINTS: 40)

Overall Proposed Project: 20

- Well-thought-out, exciting and pragmatic project plan
- Integration of the various project elements
- Project appropriately scaled in relationship to the Town of Adams and the Mount Greylock State Reservation
- Integration of sustainable development into the project
- Fulfillment of total development programming guidelines
- Economic benefits to be derived from the project
- Demonstrated commitment to minimizing environmental impacts of site development

Delivery On Project Components: 20

- Conference center and hospitality services
- Residential/lodging units offered and relationship to overall project mission
- Program & education opportunities offered, especially those at the conference center
- Variety of recreation opportunities offered on a year-round basis
- Environmental education and applied research and development offerings
- Interpretative areas and activities to be offered
- Utilization of sustainable development technologies and approaches in each project component

C. SUBMISSION DEADLINE

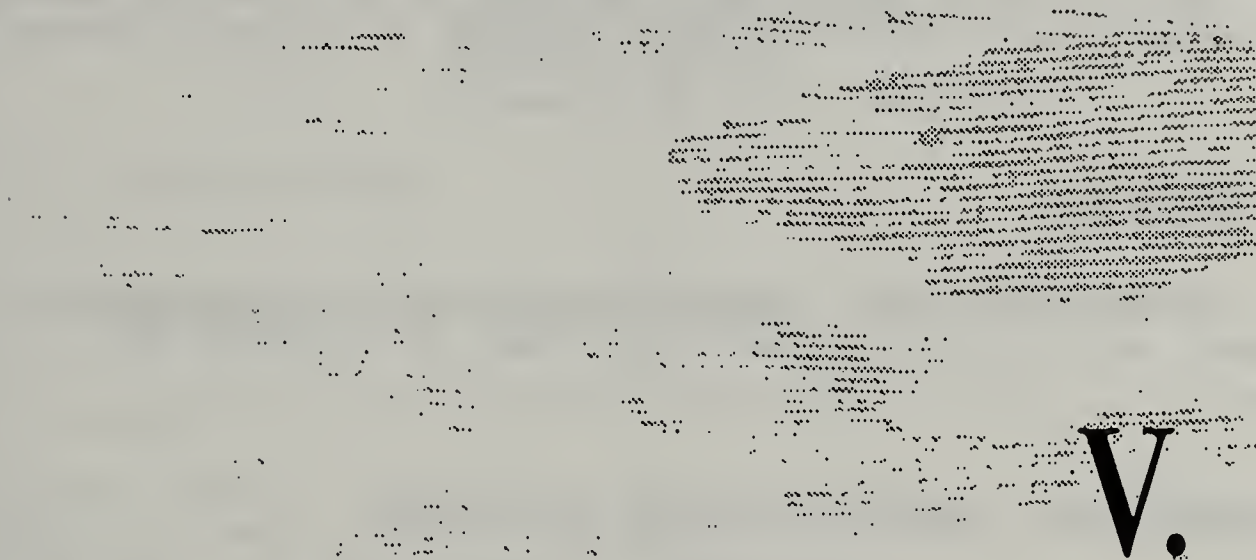
SUBMISSION DEADLINE

Proposals must be received by 3:00 PM, May 22, 1996. No proposals received after this date and time will be accepted. Please submit one original and five copies, addressed to:

Stephen Brown
Greylock Center Project Manager
Department of Environmental Management
100 Cambridge Street - Room 1404
Boston, Massachusetts 02202

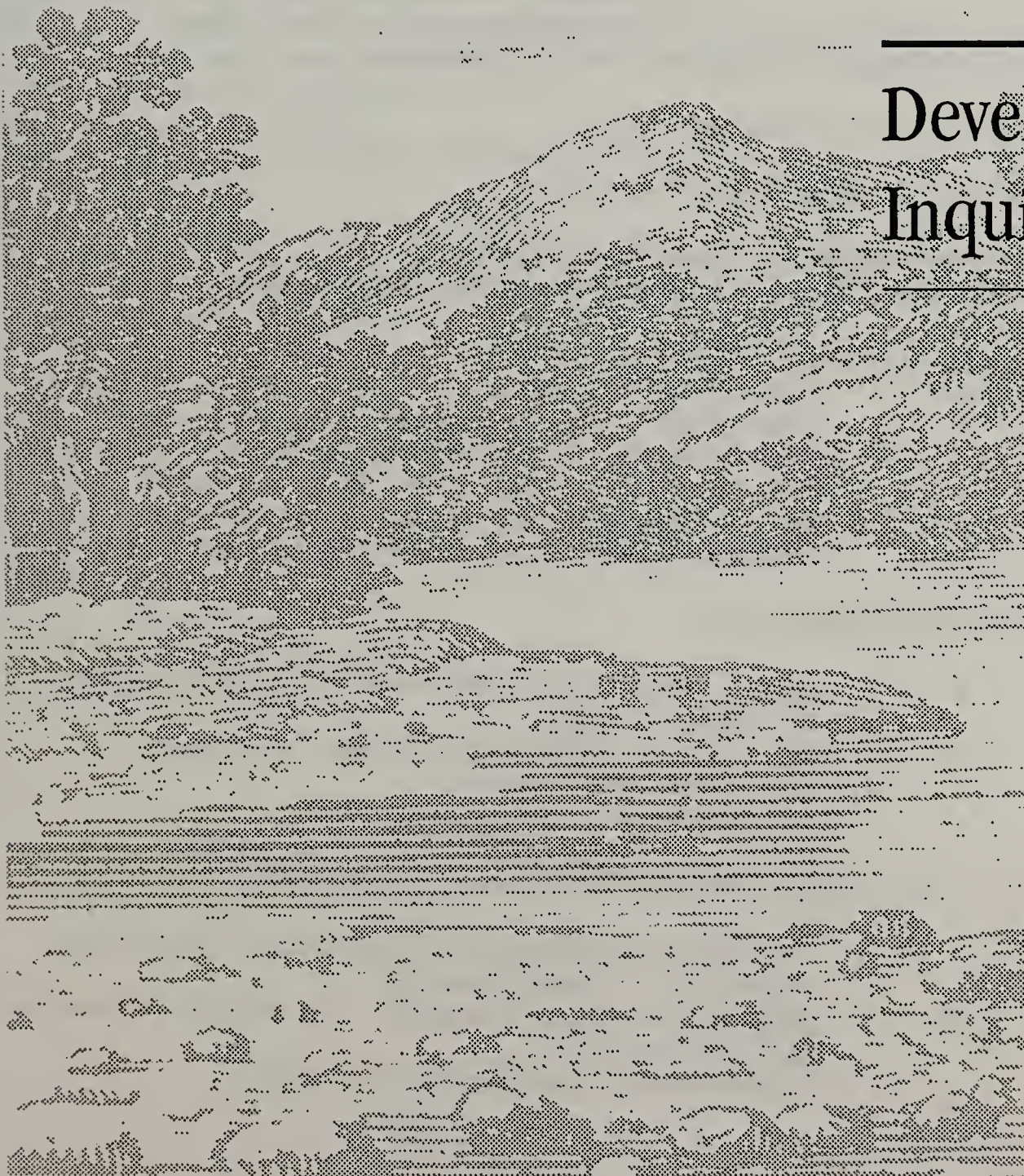
On the envelope containing the proposal, mark as follows:

Greylock Center proposal.
Do Not Open Until May 22



V.

Developer Inquiries



A. SITE TOUR AND BRIEFING

A general site tour and briefing conference has been scheduled for May 2, 1996. The briefing will be held at the Miller Annex of Town of Adams Free Public Library located at 92 Park Street at 9:30 A.M.

B. SITE ACCESS

Additional requests to tour the property shall be directed to Stephen Brown. All visits to the site shall be cleared in advance.

C. SUPPLEMENTAL INFORMATION PACKAGE

Supplemental information packages are available . The supplemental package includes the following:

A. Greylock Center Master Plan

B. Education at Greylock Center:

**Envisioning Education at Greylock Center
Creating A Unique Sense of Discovery for Visitors**

C. Site Information

- Base Maps of Site
- Land Acquired in Connection with the Development of Greylock Center
- Detailed Physical Site Information
- MEPA (Massachusetts Environmental
- Protection Act) Scoping Document

D. Regional Information

- Mount Greylock State Reservation: Summary of GOALS Plan
- Berkshire County and Town of Adams: Profiles and Market
- Information

E. Site & Building Design Guideline Information

- Specific Suggestions Regarding Various Aspects of Development
- References and Sources for Further Reading and Research
- Sustainable Development Study

F. Other

- Manufacturers and Distributors of Recycled Products in
- Western Massachusetts
- A Guide to Financing Your Venture in Massachusetts
- Summary of RFEI Responses

G. Market studies

D. REQUESTS FOR ADDITIONAL INFORMATION

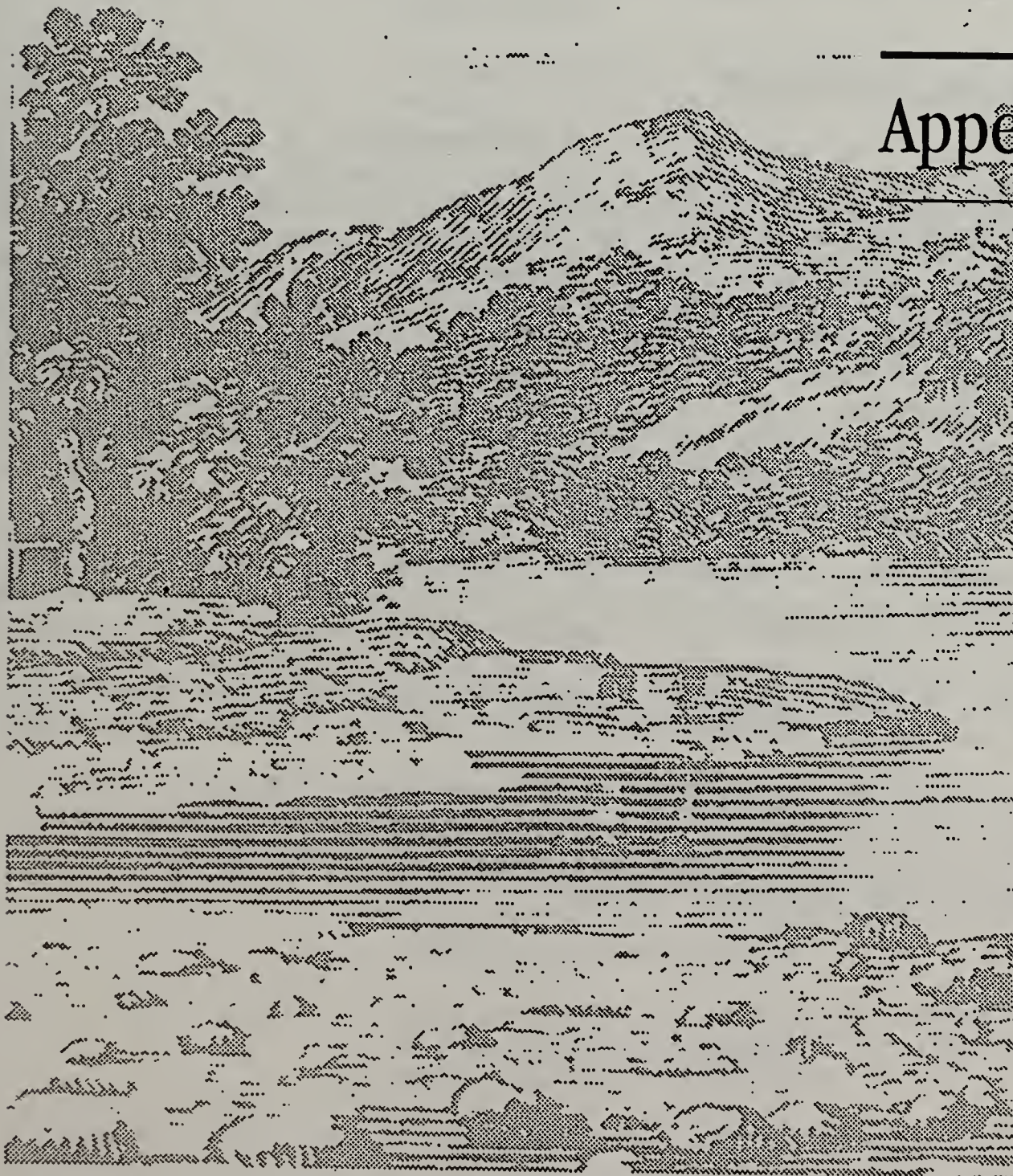
All requests for additional information shall be directed to:

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Greylock Center Project Manager
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THE
FEDERAL GOVERNMENT
OF CANADA
DEPARTMENT OF
INDUSTRY
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VI.

Appendix



I. SITE & BUILDING DESIGN GUIDELINES

One of the Commonwealth's most important concerns in the development of the site is that the highest quality of physical planning and design be applied in all phases of the project. The quality of each applicant's planning and design proposals will be a major factor in the eventual selection of a developer for Greylock Center.

In order to ensure the highest quality of design at Greylock Center, the Department of Environmental Management has established a Site & Building Design Committee to review and evaluate the submissions of all respondents.

The design and development of Greylock Center shall be guided by the following fundamental principles in as far as practicable. Proposals which demonstrate the greatest understanding of these principles will be favored.

OVERALL DESIGN PHILOSOPHY

At the core of Greylock Center is the concept of sustainability. All site and building design elements of the project should fully support that concept and integrate those principles into all of the recreation, conference, and educational facilities. The design should, where possible, demonstrate on an everyday basis, that sustainability provides early and long range benefits to the development process and to the financial success of the project, and that recreational facilities (including golf and skiing) can function in harmony with the principles of sustainability. In addition, the sustainability aspects of the Greylock Center experience should be readily apparent and capable of being interpreted by the visiting public.

The development shall support the missions and the objectives of Greylock Center while maintaining the integrity of the site. Land uses should be arranged in a complementary manner, including the connections to the community and the Mount Greylock State Reservation. Higher density elements of the program should be clustered and be consistent with the overall design philosophy.

Finally the Town of Adams and Greylock Center should relate to one another in creating a harmonious experience with Mount Greylock as the visual focus and sustainability as the environmental and economic focus.

MAJOR DESIGN PRINCIPLES AND GUIDELINES

A. PRESERVE THE INTEGRITY OF THE SITE'S NATURAL RESOURCES

Guidelines:

1. Support, amplify, complement the natural majesty of Mount Greylock;
2. Continue to provide the variety of natural resource experiences now found on the site: open fields, forests, streams, stone walls, viewsheds, etc.;
3. Where there is now planting along the inside of the site perimeter, a minimum 50' wide tree preservation area shall be maintained;
4. Design grading/land forms (e.g. golf course) to reflect and enhance natural topography;
5. Preserve and enhance contrasting landscape by preserving open fields, removing previous construction eyesores, restoring damaged areas and wildlife habitat and creating natural areas where development is prohibited;
6. Retain existing vegetation, particularly trees, to provide wildlife habitat, windbreaks, shading, erosion control, filter strips, moisture retention and aesthetic benefits;
7. Minimize forest fragmentation;
8. Avoid development in areas affecting rare and endangered species;
9. Avoid direct impact on wetlands. Protect wetlands by minimizing wetland crossings and activity within the 100' buffer zone. Insofar as practical, establish a 50' to 100' buffer of no disturbance around each wetland and waterway;
10. There should be no significant diversion or damming of streams that contain rare and endangered species;

11. Maintain any forested or shaded areas along those streams that contain rare or endangered species;
12. Post-development runoff should equal pre-development runoff;
13. Maintain the natural state of watercourses, swales, and floodways as much as possible;
14. Natural drainage should be used where possible in construction of the golf course; and,
15. Avoid development in areas affecting unique assemblages of organisms.

B. DESIGN FOR RESOURCE CONSERVATION, EFFICIENCY, & ENHANCEMENT

Guidelines:

1. Design systems that promote water conservation;
2. Use on-site water resources to the extent possible for snow making and for irrigation;
3. Design environmentally sound systems for storm water and grey water collection, pollution removal and storage;
4. Reduce energy requirements by incorporating high levels of energy conservation and efficiency into the design of all facilities;
5. Integrate passive solar features into building designs;
6. Integrate use of day lighting into building design;
7. Design with the microclimates found on the site;
8. Enhance wildlife habitat and species diversity by the use of nesting boxes and select plantings;
9. Provide for on-site sewage treatment strategies as appropriate and insofar as practical; and,

10. Restore previously disturbed areas in so far as practical.

C. PROMOTE THE WISE USE OF RENEWABLE RESOURCES
WHERE FEASIBLE

Guidelines:

1. Utilize and manage undeveloped land for maple syrup, wildlife, biodiversity, research, and recreation;
2. Plan for sustainable agriculture demonstration areas such as apple orchard blocks and limited animal agriculture;
3. Use renewable resources (such as passive solar design, biomass, solar water heating, photovoltaics, ground source heat pumps, micro-hydro, and wind power) to the fullest extent possible, in as far as practical, to meet space heating and cooling, water heating, and electric loads;
4. Use of natural renewable resources such as wood fiber products for building materials is strongly encouraged; and,
5. The use of native woods and wood products, especially those from certified well-managed forests is encouraged.

D. INTEGRATE THE CONCEPT OF RECYCLING INTO ALL
ASPECTS OF THE PROJECT WHERE FEASIBLE

Guidelines:

1. Design the capability of recycling items brought on site to the fullest extent practical, including the use of composting, recycling bins, and waste processing;
2. Use of building, landscaping, road construction, and other products made from recycled materials is strongly encouraged;
3. Use of salvaged materials (e.g., old brick and salvaged timbers from razed buildings in the local area) is encouraged;

4. Plan for the use of organic materials brought in from off-site, insofar as practical, to augment on site waste to replenish nutrients in the soil (use of a portion of the 6,000 tons of sludge in Adams to raise turf); and,
5. Plan and implement recycling for construction-generated waste within the development.

E. ARRANGE LAND USES IN A MANNER WHICH COMPLEMENT EACH OTHER AND ENHANCE SPECIAL LAND CHARACTERISTICS AND PROVIDE BUFFERS AS NECESSARY

Guidelines:

1. The higher density development should not block scenic vistas;
2. Create interconnected landscapes - contiguous networks within the site and beyond its boundaries;
3. Insofar as possible, service areas and parking should be screened from view;
4. Design for harmonious visual impact. Protect view and viewsheds within and beyond the site (e.g. be sensitive to view of Greylock Center from the summit of Mt. Greylock); and,
5. Minimize on-site vehicular traffic.

F. ENCOURAGE AND IMPROVE CONNECTIONS AMONG THE SITE, THE TOWN OF ADAMS, AND THE MT. GREYLOCK STATE RESERVATION

Guidelines:

1. Circulation ways should connect to the Town of Adams to increase convenience and to decrease construction cost of roadways;
2. Connections should be made to existing systems, i.e. nearby trails that will increase public exposure to Greylock Center;
3. A system of routes for pedestrians, and bicyclists, creating minimal conflicts with vehicles, shall be developed;

4. On-site circulation corridors should complement and not interfere with active recreation uses, thus ensuring safety;
5. The total parking count should be adequate (i.e., more or less derived as is shown in "Executive Summary: Parking Requirements" and in "Hard Surface Parking Counts", see "Supplemental Information Package");
6. The total parking count need not be constructed at the outset. It is acceptable to initially build fewer than the total as long as the total cars are shown on the site plan so they may be eventually accommodated if the need arises;
7. Insofar as it is possible, required parking should be on the periphery of the village cluster (not in a large lot in the middle of the cluster).
8. All parking should be as unobtrusive as possible and practical and in as park-like a setting as possible. Generous use of trees, shrubs and landforms should be employed to screen cars and generally soften their visual impact; and,
9. Special event parking shall be on the shoulders of roads and on grass fields;

G. BUILDINGS AND SITE DESIGN SHOULD REFLECT A VILLAGE APPROACH TO LAND USE PATTERNS WHERE FEASIBLE

Guidelines:

1. Structures and parking areas on the site should be clustered to allow minimal disturbance and to keep the majority of the site open. The following programmed uses should be clustered:
 - Conference Center
 - Indoor recreation and fitness facility
 - Program and support space
 - Indoor wellness office
 - Indoor welcome and interpretive area
 - Commercial space

2. Location of the uses around a village common (open space) is encouraged. Orientation of the common to take advantage of the view of Mt. Greylock is also encouraged;
3. Open spaces near buildings shall be designed to be pedestrian friendly. Use of wooden outdoor benches, gazebos, conservatories, etc. is encouraged;
4. To minimize the visual impact on the neighborhood, buildings shall be set back a minimum of 100 feet from any property line;
5. Buildings should not exceed three stories, except for a focal structure, which may have a spire or tower up to 60 feet tall;
6. Building exteriors should appear inviting and friendly (as opposed to monumental and pretentious); and,
7. Outdoor patios, verandas, gazebos, porches, conservatories, and other such architectural elements are encouraged.

H. LODGING, RECREATION, AND EDUCATION FACILITIES SHOULD DEMONSTRATE ATTRACTIVE, COMPELLING AND APPROPRIATE ARCHITECTURAL AND LANDSCAPE DESIGNS

1. The golf course should be built to USGA standards and showcase the golf industry's advances in environmental design and protection;
2. The conference center should meet the International Association of Conference Center criteria insofar as practical;
3. The hiking trails should, insofar as practical, conform to the standards established by the Appalachian Mountain Club; and,
4. Rustic cabins and buildings in camping areas should be in character with those found in national/state parks, be informal in character, and have natural finishes.

- I. BUILDING DESIGNS AND USES, MATERIALS, SOLAR ORIENTATIONS, AND OTHER ARCHITECTURAL TREATMENTS SHOULD HELP PROVIDE COMFORT AND A BETTER SENSE OF WELL BEING FOR THE USERS OF THE FACILITIES

Guidelines:

1. Buildings, recreation/education areas, and facilities should provide equal access to the people of all abilities;
2. Building materials and interior furnishings that create off-gas pollutants should be avoided to the greatest extent possible;
3. Building design should incorporate systems for radon mitigation; and,
4. Indoor noise should be minimized, especially in public foyers.

- J. INTERPRETATION AND DEMONSTRATION AREAS AND FACILITIES SHOULD BE DESIGNED INTO GREYLOCK CENTER AS NEEDED AND APPROPRIATE FOR THE EDUCATION OF VISITORS

Guidelines:

1. Graphic/display features about the applications of sustainable development techniques and enviro-technology solutions should be integrated into the project; and,
2. Plan for demonstration projects that illustrate innovative solutions when practical.

REPORT OF THE
GREYLOCK CENTER DEVELOPER SELECTION COMMITTEE
TO
PETER C. WEBBER
COMMISSIONER, DEPARTMENT OF ENVIRONMENTAL MANAGEMENT
FEBRUARY 7, 1996
(WITH UPDATES BASED ON MEETING NOTES)

Introduction:

The Developer Selection Committee has developed this report which describes how to make Greylock Center financially viable and retain its mission. The purposes of this report are to:

- * Provide market, site, and impact findings;
- * Present recommendations on:
 - Master plan land use and development programming guidelines revisions,
 - Developer selection process,
 - Project development parameters and
 - Early action steps; and
- * Obtain Advisory Committee members' votes in support of its recommendations to the Commission of the Department of Environmental Management, Peter C. Webber.

Advisory Committee Voted Unanimously In Support Of Recommendations

Executive Summary:

1) The legislative-mandated goals for Greylock Glen remain valid today. The purpose of **Chapter 676 of the Acts of 1985** is to create a regional economic and recreational facility for Berkshire County. Greylock Glen was acquired for specific development purposes; as such it was not intended to become part of the Commonwealth lands that are protected under **Article 97 of the Articles of Amendment to the Constitution of Massachusetts**. The legislation intended that the lands were to be developed for "recreational, residential, and commercial uses" and be carried out as a joint public and private effort.

2) For Greylock Center to succeed, the concept and tactics employed to fulfill its mission must evolve as follows:

- Innovative programming, especially in the conference center, needs to be developed in order to create the strong, on-going market demand required for a destination area. Greylock Center must develop a reputation for excellence. Greylock Center must be in the same league as the Aspen Institute, the Omega Institute, the Keystone Institute, and the Chautauqua Institute. Conferencing and education are the lynch-pins of the project in that they generate demand. If demand increases, occupancy rates will rise and the financial gap will shrink.

■ New profit centers must be created and development parameters must be expanded. Master plan expansion of the golf course (allowing up to 27 holes) and addition of more residential units, real estate ownership options, and income producing space are being recommended for the following reasons:

- * New program elements are needed to create the strong destination draw needed for viability and to create the overall signature of the project.

- * The current development program has a financial gap that must be closed. Offering greater flexibility will shrink the financial gap.

- * New profit centers enhance the draw of the whole project by better accommodating those whom Greylock Center already intends to serve, (such as golfers) and opening up new markets (such as the long term tourist stay market) which the currently outlined project does not provide.

- * Expanded parameters will increase year-round activity on site and create the cross linkages needed among the various components.

- * New development options will enhance the project's mission of demonstrating sustainability, not only in land use planning but also in the demonstration of alternative building technologies utilized on site.

3) The introduction of new profit centers, which add cash flow to the project, is not sufficient, on its own, to make the project economically viable and to create the economic engine that the Northern Berkshire region needs. New educational programming for the conference center and new public, not-for-profit, and for-profit investment needs to be brought forth to make the project a success. The educational curriculum for the conference center and additional investments will be secured once a development partner is selected.

4) A developer, working with us, needs to be engaged in creating the site and building design plans, crafting the final financial structure of the deal, and further developing the program for the site. We can not create the final shape of this project without a development partner.

5) Even though rounding out the development program and closing the financial gap are important priorities, the final development program must be done in an environmentally sensitive manner - one that utilizes the site and building design guidelines embedded in the master plan and the RFDP and articulated in the **Sustainable Development Guidelines for Greylock Center**. Greylock Center will be cited as a model for environmental sensitivity to be emulated, such as DeWees Island, S.C. and Sunnyslope in Loudon County, Virginia are today.

6) An early action program to begin making Greylock Center a reality will begin this spring and will be carried out cooperatively between the State and key stakeholders.

Developer Selection Committee Findings:

Results of the Debriefing Sessions:

Each of the development proponents were interviewed and debriefed. The primary findings from these sessions were:

- 1) The developer proponents continue to express interest in Greylock Center and would like to participate in the next round of request for development proposals (RFDP) submissions as long as the marketing time period for the new RFDP is reasonable, the new submission requirements are not onerous, and the development guidelines allow the development of a project that is economically viable.
- 2) In order to maintain developer interest, the development guidelines must accommodate greater flexibility, especially as it relates to housing and golf. Developers also recognize that additional joint venture participation by the state, town, and others (programmatic and funding) will also be necessary to achieve viability.
- 3) The developers want to come to the table and work out the details of site planning and building design in consultation with stakeholders. Creating the final development plan without consultation with the selected developer will not work out to the best interest of anyone.
- 4) Each proponent, in their own way, stated how important it was that the project create a signature or a unique identity for Greylock Center.
- 5) To close the funding gap, it is necessary to attract corporate and non-profit sponsorship and their associated constituencies. Sponsorships could include, for example, trade group sponsorship such as the Natural Fiber Institute proposed by the Village Company of New England; individual corporate sponsorship from companies such as Reebok Co., International Paper, Fidelity, and G.E.; and non-profit sponsorship from educational institutions such as the Massachusetts Corporation for Telecommunications, North Adams State College, Williams College, and MassMOCA.

Results of Marketing Analysis:

- 1) The market for this project is thin, particularly the conference center component. The Berkshires typically draws its visitors from the south (primarily from the Hartford/New Haven and Greater New York market areas) and the southern Berkshires captures the majority of the market. The evolving market draw currently being generated by MassMOCA will assist in bringing visitors to the Northern Berkshires. However, to be successful, Greylock Center must create its own market following - one that is directly related to its mission. The areas, facilities, and programs offered (especially at the conference center) must create a drawing power sufficient to overcome the access problems associated with the location of the site.
- 2) Environmental sustainability entails the creation of a new product type, which adds to the risk profile of the project. In order to lower the development risk profile, sustainability must be used as a "signature" for the project and as a way to create long-term savings in energy and material costs.
- 3) If the vision of Greylock Center is to be fulfilled, more capital investment and on-going operating revenue needs to be brought to Greylock Center. State, Town of Adams, non-profit and private sector participation is required. Contribution to the project can be provided in a variety of ways, ranging from being a tenant at the site to offering programs that could be run from the conference center.
- 4) For Greylock to be successful, project components and programming/curriculum offerings must be integrated in a fashion that truly creates a unique place to live, learn and recreate.
- 5) A strong partnership needs to be established among a variety of parties to ensure successful implementation of the project. Finding ways to create viability while remaining true to our vision is a shared problem and everyone must pitch in and prove that sustainable approaches to development are good (profitable) for business as well as being good business.
- 6) The conference center/education concept is the linchpin of the project and, as such, needs to be clearly defined. Program and subsidy requirements/revenue enhancing elements also need to be delineated. Once the unique differential advantage of the conference center is articulated and innovative programming is offered, Greylock Center will be the economic generator originally intended.

Results of the Site Accommodation Analysis:

Ken DeMay of Sasaki Associates, Inc., at the direction of the Selection Committee, developed proof plans to determine the maximum program that the site could accommodate without compromising important natural resources (See: Site Accommodation Map). After placing the new natural resource findings from the Center for Ecological Technology's natural resource team on a base map, several development scenarios were tested by Ken DeMay. In drawing his accommodation plan he made the following assumptions:

- 1) The **Site & Building Design Guidelines** articulated in the master plan and the RFDP are the performance standards used in the development planning and design exercise.
- 2) The additional residential components are to be serviced by town sewer (or an appropriate proven environmental septic technology).
- 3) The residential components reflect a building and site design reflective of the traditional New England village approach to land use patterns where feasible.
- 4) Residential components would, where feasible, integrate with and complement other land uses and recreation activities such as golf.
- 5) There is a mix of residential types (attached and detached).
- 6) Wetlands, except for a few crossings, are not infringed upon. However, fairways were allowed to be sited in wetland buffer zones.
- 7) Rare species habitat and important vegetative groupings are not infringed upon.
- 8) Except in a few exceptions, no buildings or man-made structures are designated for areas having slopes over 20% and no buildings were allowed on the previously developed ski slopes or in the forested areas west of West Mountain Road.

After testing several scenarios, Ken DeMay's analysis illustrates how the site can accommodate the development program outlined in the master plan, as well as, up to 9 additional holes of golf and 300 residential units.

The purpose of the planning exercise was not to arrive at the optimal solution but to give us a better understanding of what is possible and to provide a benchmark from which to measure other proposals. This accommodation study is one development scenario and is not our current recommendation for this project. In the RFDP phase we have just completed, developers have presented us with what they consider the appropriate site accommodation levels. However we felt that we had to make our own determination concerning the maximum program that the site can accommodate while remaining within the stated "Site and Building Guidelines" of the master plan and the RFDP. Now we have an informed understanding from which to evaluate development options and to assess the drawbacks associated with each option and the tradeoffs involved.

Impact Analysis :

Greylock Center will generate environmental and economic impacts, which are described in the attached Impact Analysis Chart. The impacts of the new elements are summarized below.

The residential element proposed would create the following impacts (assuming 300 units):

Environmental Impacts

Total Parcel (Acres):	75
Disturbed Woodland (Acres):	25
Building Foot Print (Square feet):	300,000
Parking Spaces:	600

Economic Impacts

Short-term Jobs Created:	413	
Long Term Jobs Created:	6 - 20	
Town Property Tax Revenue:	\$452,100/year	\$1,507/unit
Town Service Cost:		
Permanent Residence:	\$339,645/year	\$1,132/unit
Seasonal Residence:	\$279,699/year	\$
933/unit		
Capital Gap Coverage:	\$1,500,000	

The additional 9 holes of golf would create the following impacts:

Environmental Impacts

Total Parcel (Acres):	105
Disturbed Woodland (Acres):	9
Building Foot Print (Square feet):	NA
Parking Spaces:	100

Economic Impacts

Short-term Jobs	22
Long Term Jobs Created:	6
Town Property Tax Revenue:	\$33,500
Town Service Cost:	
Capital Gap Coverage:	\$2,200,000

This impact analysis, along with what has been done for the existing development program, will be extremely helpful in the future as we evaluate

Greylock Center

Environmental and Economic Impact Analysis (Illustrative)

Based on Plans Developed by Sasaki Associates, Inc.

Program Components	Environmental Impact					Economic Impact			
	Total Parcel (Acres)	Woodland Area Disturbed (Acres)	Building Foot Print (Sq.Ft.)	Parking Spaces		Short-Term Jobs Created Onsite	Long-Term Jobs Created Onsite	Town Property Tax (\$)	Town Service Cost (\$)
				#	Sq.Ft.				
Current Master Plan - Expected Buildout									
Golf Course (18 Holes) and Clubhouse	210	82	1,600	165	54,450	56	12	\$85,500	(2)
Conference Center - 140 Rooms	15	3 ⁽¹⁾	75,000	300	99,000	166	35	\$226,000	(2)
Recreation	15	0	1,200	95	31,350	19	TBD	(2)	(2)
Environmental Education Center	10	7 ⁽¹⁾	15,000	50	16,500	28	2	(2)	(2)
Infrastructure	10	TBD ⁽¹⁾	NA	NA	NA	45	TBD	(2)	(2)
Total	260	92	92,800	610	201,300	314	49	311,500	(2)
Proposed Master Plan Amendments									
Residential Units (300 ⁽⁵⁾ seasonal or rental)	75 ⁽³⁾	25 ^(1,3)	300,000	600	198,000	413	TBD	452,100	932.89/unit 279,699 ⁽⁴⁾
Additional 9 Holes of Golf	105	9	NA	100	33,000	22	6	33,500	(2)
Institute/Themed Learning Center	NA	NA	1,000	15	1,650	1	5	(2)	(2)

- ⁽¹⁾ These areas will not be clear cut. Care will be taken to preserve as much existing cover as possible.
- ⁽²⁾ To be provided by Jim Leitch.
- ⁽³⁾ Total parcel areas and woodland area disturbed will depend on the type of unit (detached or attached).
- ⁽⁴⁾ Town Service Costs for permanent residential units would be slightly higher (\$1,132.15/unit or \$339,645/300 units).
- ⁽⁵⁾ This is only one possible scenario. It is not necessarily what the Developer Selection Committee recommends.

Definitions and Assumptions

Woodland Areas - Consist of forest or semi-covered open field returning to forest.

Parking Spaces - Number of spaces for golf course, conference center and education based on guidelines developed by Sasaki Associates, Inc.. Assume 2 spaces per residence. Assume 330 square feet per space (includes circulation lanes).

Short-Term Jobs Created - Construction Jobs, assume 50% of building cost is labor and that the average worker earns \$40,000/year.

Long-Term Jobs Created - Assume \$30,000/year, based on projected cashflow sheets.

Town Property Tax - See attached Fiscal Impact Summary provided by the Town of Adams.

Town Service Cost - See attached Fiscal Impact Summary provided by the Town of Adams.

Residential Units - Assume 1/4 acre lots costing \$23,000 with a 1,000 square foot home costing \$110,000. See Attached Fiscal Impact Summary provided by the Town of Adams.

Institute/Themed Learning Center - Assume part of Conference Center.

Financial Analysis:

Analysis of the financial feasibility of the Greylock Center program identified a variety of methods for improving the financial viability of the project (See attached Financial Analysis).

Independent financial analysis, as well as the response of the proponents, concluded that:

I) Greater flexibility in the development programming requirements of the master plan is needed to create a project with sufficient drawing power to overcome the issues of a thin market and less-than-advantageous site location and access features. A highly identifiable and marketable theme or signature must be defined and must be bolstered by other elements of the program to create a strong destination draw. An increase in conference center revenues produced by as little as a 10% more occupancy and \$5.00 more per room night would, by itself, reduce the financial gap by over \$2.0 million.

II) Master plan revision allowing for expansion of the golf course to 27 holes has the capacity to aid the financial performance of the conference center. Even without more aggressive occupancy or room rate assumptions for the conference center, the expansion of the golf course to 27 holes could reduce the financial gap by approximately \$2.2 million.

III) A revision allowing for the development of additional lodging offerings for conference center attenders and longer stay visitors increases year-round activity and assists the financial performance of the conference center.

IV) Adding the residential options reduces the financial gap by approximately \$5,000 per unit (by \$1.5 million for the 300 units shown in the attached program illustration).

V) State, local, non-profit and private sector participation in the program, curriculum and financing of the project will also be required in some combination. For example:

- * The State might, through the Mass Development Finance Agency or the Health and Education Finance Agency, explore low interest bond funding for the project.

- * The Town might explore PWED (Public Works for Economic Development) or Chapter 90 Roadway funding to reduce the cost of necessary infrastructure.

* Non-profit sponsorship or joint venture participation from local educational, cultural or environmental institutions such as the University of Massachusetts at Amherst, Williams College, MassMOCA, Audubon or others to expand the curriculum for users of the Greylock Center, might increase the project's drawing power.

* Private industry sponsorship or joint participation or the creation of a research institute (like a natural fiber institute) would help to establish the necessary theme or signature for the Greylock Center.

In short, the inter-relationship of development uses, program curriculum, financing sources, participants, and participant interest are essential to the financial viability of the project. Creating the linkages necessary for the whole concept to be a success is one of the greatest challenges of the project and one which can only take place with all vested parties, including the designated developer, at the table together.

Financial Analysis

Analysis of the financial feasibility of the Greylock Center program identifies a variety of methods for improving the financial viability of the project.

First, independent financial analysis as well as the response of the market clearly indicates that greater flexibility in the programming requirements of the Masterplan is needed to create a project with sufficient drawing power to overcome the issues of a thin market and less than advantageous site location and access features. Specifically, a highly identifiable and marketable theme or signature must be defined for the Conference Center and once defined must be bolstered by other elements of the program to create a strong destination draw. An increase in Conference Center revenues produced by as little as 10% more occupancy and \$5.00 more per room night would by itself reduce the financial gap by over \$2.0 million.

Masterplan revision allowing for expansion of the golf course to 27 holes has the capacity to aid the financial performance of the Conference Center and even without more aggressive occupancy or room rate assumptions for the Hotel/Conference Center, could itself reduce the financial gap by approximately \$2.2 million. Similarly a revision allowing for development of additional lodging or residence units on the site could expand lodging offerings to Conference Center attendees, increase year-round activity levels on the site and in addition to assisting the financial performance of the Conference Center, reduce the financial gap by approximately \$5,000 per unit (by \$1.5 million for the 300 units shown in the attached program illustration).

Second, financial analysis also shows that revision of the allowable development programming alone is not likely to be sufficient to ensure the drawing power and thus marketability of the Greylock Center concept. State, local, non-profit and private sector participation in the program, curriculum and financing of the project will also be required in some combination. For example, the State might, through the Mass Development Finance Agency or the Health and Education Finance Agency explore low interest bond funding for the project. The Town might explore PWED or Chapter 90 Roadway funding to reduce the cost of necessary infrastructure. Non-profit sponsorship or joint venture participation from area educational, cultural or environmental institutions such as UMASS, Williams, MassMOCA, Audubon or others to expand the curriculum for users of the Greylock Center, might increase the project's drawing power. Similarly, private industry sponsorship or joint venture participation or the creation of a research institute of some sort might help to establish the necessary theme or signature for the Greylock Center.

In short, the inter-relationship of development uses, of program curriculum, of financing sources, of participants and participant interests is essential to the financial viability of the project. Creating the linkages necessary for the whole concept to be a success is one of the greatest challenges of the project and one which can only take place with all vested parties, including the designated developer, at the table together.

Greylock Center Masterplan
Financial Analysis
Summary of Project Costs and Financial Gap

MASTERPLAN PROGRAM REVISIONS	PROGRAM COSTS	FINANCIAL GAP					Comments
		Total - All Development Components	Public/Non-Profit Gap - Non-Revenue Producing Uses	Private Sector Gap - Revenue Producing Uses	Total Gap - All Development Components	Available State Funding	Remaining Financial Gap (-) or Surplus (+)
Illustrative Full Build Program Lodging Rooms and Conference Center (140 rooms)	\$13,300,000	\$0	\$8,500,000		\$8,500,000		
Increased Conference Center Demand	\$0		(\$2,300,000)		(\$2,300,000)		
Golf Facility (18 holes)	\$4,500,000	\$0	\$0		\$0		
Expanded Golf Facility (Extra 9 holes)	\$1,800,000	\$0	(\$2,200,000)		(\$2,200,000)		
Residential/Expanded Lodging (300 units)	\$26,100,000	\$0	(\$1,500,000)		(\$1,500,000)		
Outdoor Recreation (Trails, x-country, etc.)	\$1,500,000	\$1,500,000	\$0		\$1,500,000		
Education (Staff only)	\$600,000	\$600,000	\$0		\$600,000		
Infrastructure (Sitework, Roads, Parking)	\$3,600,000	\$3,600,000	\$0		\$3,600,000		
Total Development Cost of Illustrative Full Build Program Total Financial Gap for Illustrative Full Build Program	\$51,400,000	\$2,700,000	\$2,500,000		\$8,200,000	\$6,500,000	(\$1,700,000)

Illustrates a lodging program large enough to leverage the economic feasibility of the overall project; illustration modeled based on conservative occupancy (55%) and rate (\$70/room night) assumptions

Increasing occupancy (illustration shows increase from 55% to 65%) and room rate (illustration shows increase from \$70 to \$75/room) assumptions reduces subsidy requirements, in this example, by \$2.3M

Private golf operation is self-sustaining at 18 holes and requires no direct subsidy (except for zero land cost)

Extra 9 holes of golf generates \$2.2 million of gap coverage to help support other elements of the program

Residential units could produce gap coverage on the order of \$5,000 per unit to help support other elements of the program; could include mix of attached and detached units aimed at second home and expanded conference and golf markets

Includes 2 FTE program staff each at \$30,000/yr

Remaining gap to be resolved in cooperation with a selected developer through refinement of Greylock Center development program, curriculum and financing - See options described on Page 3

Greylock Center Financial Analysis
Program Descriptions and Key Financial Assumptions

Project Programming	Program Descriptions	Key Financial Assumptions
Illustrative Full Build Program		
Lodging Rooms and Conference Center	140 room lodging facility; 10 meeting rooms; ancillary retail; full food and beverage service; full indoor recreation facility	Room Rate = \$70/night; Avg. Occupancy = 55%
Golf Facility	27 hole golf course with pro shop, clubhouse, driving range and 4 tennis courts	Annual Dues = \$1,000/yr.; Greens Fees = \$35/round; Cart Fees = \$18/round
Residential/Expanded Lodging	300 units of various types, with emphasis on clustering around a Village Center concept, aimed at second home and expanded conference and golf markets	Average Unit Sale Price = \$135,000/yr.
Outdoor Recreation	Trailheads, 15 miles of recreation/cross-country trails, 1 mile of interpretive nature trail, x-country trail grooming, swimming pond, skating area and sledding area	Assumed to generate no revenue
Education	2 FTE program staff	2 Program Staff = \$60,000/yr (would require endowment of \$600,000 to support)
Infrastructure	Roads, utilities, general site work and parking costs	Assumed to generate no revenue

Greylock Center
Financial Restructure Analysis
List of Options for Potential Further Investigation

POTENTIAL RESTRUCTURE OPTIONS	COST REDUCTION MEASURES	REVENUE ENHANCEMENT MEASURES	Notes
PROGRAM RELATED OPTIONS			
<u>Reduce Greylock Center Costs</u>			
Reduce Recreation Program Cost			Might include reducing trail lengths, reducing level of trail improvement, eliminating ski trail grooming, etc.
Reduce Education Program Cost			Might include reducing size of environmental education building, limiting education to staffing only, etc.
Reduce Infrastructure Cost			Might include reducing level of site improvements, reducing parking standards, etc.
Accommodate Some Program Elements Offsite			Might include utilization of Bascomb Lodge as substitute for onsite environmental education center, etc.
Other Ideas			
<u>Increase Greylock Center Revenues</u>			
Increase Demand for the Conference Center			Might include improved occupancy arising from synergy with other elements of the project such as successful educational or recreational programming or addition of residential users or employees to the site
Increase Size of Golf Course			Might include expansion of golf course to 27 holes
Add Residential/Expanded Lodging Units to Program			Might include addition of residential units aimed at second home and expanded conference and golf markets
Other Ideas			
PARTICIPANT RELATED OPTIONS			
<u>State Participation</u>			
Direct Funding			
Tax Exempt Bond Funding			Might include involvement of Massachusetts Development Finance Agency
Conference Facility Lease			Might include Commonwealth commitment to lease some amount of conference center utilization
Loan Guarantees			Might include involvement of Massachusetts Development Finance Agency
Office Space Lease			Might include Commonwealth commitment to lease some amount of commercial office space
Contribution of State Timber to Construction			
Other Ideas			

- expansion of the golf course up to 27 holes if such expansion is done in an environmentally sensitive manner; does not detract from the other intended, equally important uses of the site; and does not cut off important habitats for nature recreation, interpretation, and environmental education activities.
- the inclusion of alternative ownership structures such as time interval ownership as an option both within the residential units as well as in the conference center, and
- the suggestion of the creation of space for one or more institutes/themed learning centers, such as the creation of an environmental technology center as recommended in the **Envisioning Education at Greylock Center** (which is intended to be a research field station for the testing and demonstration of environmental technology), a natural fibers institute (whose purpose would be to increase scientific understanding of forest and fiber environmental issues), and an arts and technology education institute (similar to the Banff Center in the Rocky Mountains).

**Motion To Recommend: Paul Hutchinson, Second by George Haddad.
Passed Unanimously.**

2) Recommendation for Further Investment and the Establishment of a Development Fund: For the development program to reach the optimal mix of areas and facilities, greater public and private investment, especially for those non-profit/public elements, will be required. The Developer Selection Committee believes that investment should be pursued with vigor. To that end, they recommend that a fund (using moneys from the authorized bond accounts in Chapter 676 of the Acts of 1985) be established and be matched by the developer who is given preliminary designation to assist in:

- Development and definition of the conference center/education concept;
- Seeking out new public, private, and non-profit investment which would strengthen the conference/educational component of the project; and
- Creating a foundation or institute which would further the interests of Greylock Center.

This dollar-for-dollar match is particularly important to encourage a creative solution for the development of the differential advantage of the project, especially its conference center.

3) Issue a New RFDP: The Developer Selection Committee recommends that a new RFDP be issued in 45 days, that it be on the market a short period of time (say 60 days), and that a proponent be given a conditional designation to develop the final project. The selected developer would be charged to create a development plan which would achieve the following objectives:

- Market feasibility,
- Economic vitality at both the micro and macro levels,
- Environmentally sensitivity,
- Minimizes risk & public subsidy, and
- Maximizes opportunity.

The Developer Selection Committee recommends that the Greylock Center Advisory Committee recommends that the RFDP be molded into one that more strongly rewards proponents who have the capabilities and capacities to carry out the project in a consultative manner and rewards teams that have strong site & building design capabilities and understand the concept of sustainable development. The Site & Building Design Committee, which is made up of well respected design professionals, has been and will continue to be helpful in evaluating the capabilities of the teams.

4) The time has come for Greylock Center to become a reality. As such the Developer Selection Committee endorses the concept of the early action plan proposed by Commissioner Peter C. Webber and recommends that the Advisory Committee endorse this approach and that the key stakeholders work cooperatively to begin programming the site on a regular basis.

**Motion to Recommend: Bernie Pinnsonault, Second Doug Poland
Passed Unanimously**

LEGEND

State-Listed Species Location

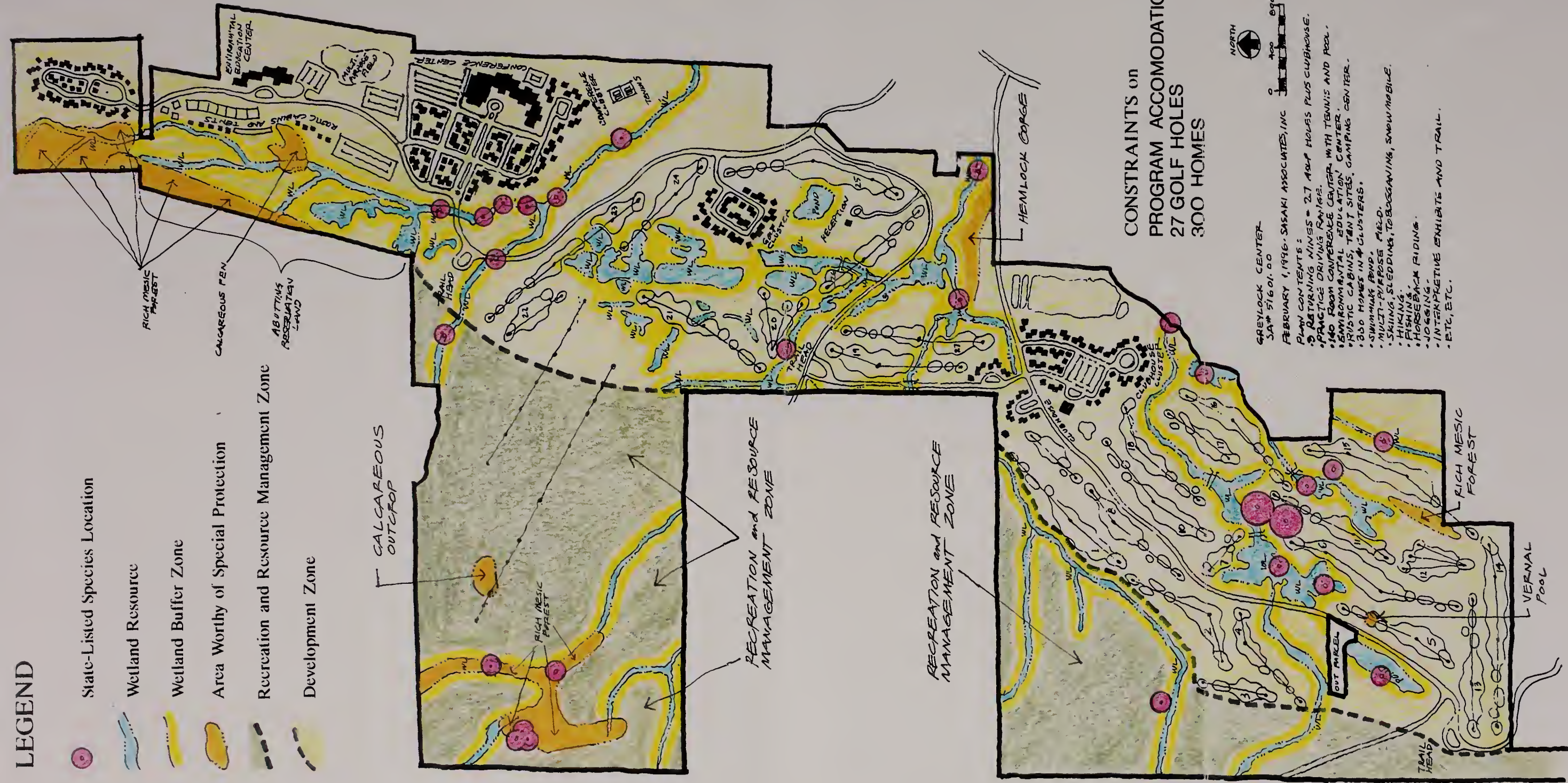
Wetland Resource

Wetland Buffer Zone

Area Worthy of Special Protection

Recreation and Resource Management Zone

Development Zone



CONSTRAINTS on
PROGRAM ACCOMMODATION
27 GOLF HOLES
300 HOMES

GREYLOCK CENTER
SA# 51601.00

0 400 800



PLAN CONTENTS:
FEBRUARY 1, 1996. SAKAKI ASSOCIATES, INC.

- RETURNING NINES - 27 ADP HOLES PLUS CLUBHOUSE.
- PRACTICE DRIVING RANGE.
- 180 ROOM CONFERENCE CENTER WITH TENNIS AND POOL.
- EMPIRICAL EDUCATION CENTER.
- RUSTIC CABINS, TENT SITES, CAMPING CENTER.
- 300 HOMES IN 4 CLUSTERS.
- MULTI-PURPOSE FIELD.
- SKIING, SLEDDING, TOBAGGANYING, SNOWMOBILE.
- HORSEBACK RIDING.
- JOGGING.
- INTERPRETIVE EXHIBITS AND TRAIL.
- E.T.C.

